

ALASKA GREEK FESTIVAL EVENT MANGEMENT PLAN

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ALASKA GREEK FESTIVAL EVENT MANGEMENT PLAN

A
PROJECT

Presented to the Faculty
of the University of Alaska Anchorage

in Partial Fulfillment of the Requirements
for the Degree of

MASTER OF SCIENCE

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Anchorage, Alaska

May 2016

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Abstract

The annual Alaska Greek Festival in Anchorage, Alaska is an event managed by volunteers, a subcommittee and a chairperson. There are dozens of documents that relate to the operations of the event, and volunteers who know how things have happened in the past, but neither clear guidelines, nor standard practices. This lack of clarity leads to inefficiencies, conflicting ideas, confusion and waste.

The festival's history is 20 years old. The time is right for a positive shift to a more structured program. This shift will allow for policies and procedures to be codified, expectations to be made clear, the limited resources to be reviewed and efficiencies attained.

The deliverable for this project would be the creation of a Greek Festival Best Practices Guide. This guide would include a volunteer/human resources management plan, quality assurance methods, as well as metrics gathering systems. The guide will also include tools that can help the festival subcommittee evaluate resource usage and find efficiencies in their current processes.

This project's deliverable would serve as a living document, for the community to reference and use to measure the success of meeting the festivals mission statement year after year.

Keywords

- Greek Festival
- Event Planning
- Greek Culture
- Cultural Festival/ Event
- Lean Six Sigma Quality Improvement
- Applying Lean Six Sigma Tools

Introduction

This project was undertaken because of a need in the community to address the lack of documented institutional knowledge, and to give a stronger structure to the annual Greek Festival.

The community, and the people who operate the festival have been wonderfully supportive during this process and have been excited for the help. They have been supportive of the project and are interested in helping to create the final deliverable. This is beneficial because it has created buy-in for the final product, and will likely lead to its continued use for many years.

The festival organizers deserve thanks for all their time and love throughout this process and they deserve praise for all of their hard work on making this final deliverable their own, through comments, careful edits, passionate arguments and ultimately accepting and using the document.

Background

The process for defining a capstone project for the Master of Science in Project Management was highly suggested to have more than just an idea walking into PM 686A. Having a draft scope, an idea of timeline and deliverables to hit the ground running and accomplish all the project and academic work required of the classes was ideal.

The Greek festival was an excellent choice for several reasons. First the festival needed process analysis and to more efficiently use its limited resources, such as volunteers and space, both of which were needed in continuing the Greek festival's growth while resolving the breaking point of the event's resources.

The second reason for choosing the Greek festival project was that the time was right for someone to come in and create an event management plan. People had tried before and ultimately given up before completing a plan. The people in charge of the festival had lots of documentation, but no one person was able to devote the time to creating an event plan. They were more than willing to have someone take on this challenge.

Purpose

The issue that this paper and project attempt to resolve is the lack of structure that has become clearly necessary for the successful implementation of the Alaska Greek Festival. Creating structure will establish set standards of practices for how to host the festival. This is needed for two reasons; first, the festival has grown and is now too large for a single person to operate. Secondly the generations that started the festival, and helped it to grow has raised their families and now want to pass the torch to the next generation to lead the festival management.

After 20 years, the festival founders are moving on, both metaphorically and physically. Some of them have returned to Greece to retire. Others have retired here and there and some have passed on. Their children have inherited the festival, with all its glory and its challenges.

The festival is now in its 20th year and has become an institution in the community of Anchorage. The festival was started to raise funds to build a new Byzantine style church. While the church has been built, it was built with a loan, and the festival proceeds partly service that debt.

The challenges that this paper and project will attempt to address include the issues previously mentioned, the lack of structure with the creation of an Alaska Greek Festival Event Management Plan, and the lack of strategic planning for the festival. The Event Management Plan will give the festival structure by setting standards of practice, setting clear strategic planning requirements, and creating a festival culture of joy rather than dread.

The issue impacts are clear to the festival organizers. They are very excited about movement, any movement, with the hopes that what is created can help de-stress and clarify how to host the festival. Currently the festival management process is less of a process and more an event of people getting together and trying to complete and delegate tasks without any management level leadership (except for the Chairperson position). The Chairperson position is thus weighed down with all the management decisions and does not have enough support to effectively run the festival.

The Chair's position is very stressful, and the stress reverberates down to all aspects of the festival. All issues and concerns become urgent because there is only one person out of the hundreds of volunteers that has the authority and moral will to make decisions and address problems. Most notably, no one wants to take this position. For the past few years it has been foisted upon one person, who becomes quickly burned out, as are many of the other volunteers.

Since there is no management level of authority, everything is run by the Chairperson, with the exception of the booth leads during the event. Each booth has a lead, and each lead acts as the authority of that booth. This can create conflict between the booths because of limited resources, specifically space. There is no more room to spread out at the festival's current location, and the booth leads are unwilling to alter or change the layout of their space, preventing growth and change. Each festival is very similar to the last. This is both good and bad. Good because guests know what they can expect but bad because the festival cannot grow.

The goal of this project is to create an event management plan that facilitates the festival adapting and growing.

Scope

The scope of this project was created to be nimble (vague) to allow for flexibility to address the specific needs of the festival, the Chairperson and the volunteers. It was also crafted to be clear in defining the requirements that are necessary to create an event management plan. It also requires research for both the Alaska Greek Festival records and other Greek festivals in the United States. The full scope is located in the project plan located in the appendix.

The project scope for the creation of an event management plan for the Alaska Greek Festival includes several important items. Most important were the procurement management, financial management and the event set up, management and clean up processes. These were deemed to be critical because of what the festival needed to be less stressful and more productive.

Procurement was in desperate need for clarity and process. Most of the good are donated, but without clear procurement processes, the festival organizers were often scrambling to get materials that ran out faster than expected, or items that were thought to have been ordered but were not, or items that were overlooked entirely. This was one expense that the Chairperson believed could be better controlled through proper management. By keeping down expenses, the festival is able to increase profitability. That profitability in turn is used to build the Greek Orthodox Church.

Financial management was also critical to set clear expectations and rules involved with purchases, capital investments and the handling of cash during the festival by volunteers.

Set up, management, and clean up were also defined as critical because they are the event. They are also the most stressful part of the hosting the event. These sections cover the parts of the festival that guests see and directly interact with the Greek community.

The project plan excludes researching other types of cultural festival and fairs, specifically the Alaska Fair, as it is distinctly different from the Alaska Greek Festival because the Alaska Fair has a dozen or so full-time staff, hundreds of part time staff, and runs most of the booths and all of the rides through vendors.

The project plan also excludes the management of the Alaska Greek Festival, and the final event management plan does not have to be accepted by the Alaska Greek Festival organizers or Chairperson. These were added to the plan to prevent scope creep and to set a clear end to the project.

The goal for this project is to create an event management plan for the Alaska Greek Festival to help solidify the institutional knowledge of the planning and execution of the festival. Objectives include documenting the institutional knowledge, defining a clear set of operational standards, defining all processes involved in the planning, execution and close out of the event, and defining the timeline of the event.

The goals and objective were written with the intent of handling the challenges of creating structure for the festival and to engage in strategic planning that allows for proper and controlled growth of the festival.

The Critical Success Factors (CSF) are very simple. To meet defined milestones, which included submitting the Letter of Support from the sponsor, completing the research plan and completing the event management plan, and to receive access to the Alaska Greek Festival Digital Dropbox.

Both of these were met, and thus the project was a success.

While the CSF were simple, there were Acceptance Criteria to ensure a high quality product. It included that all the deliverables met their deadlines, that stakeholders were used to craft the deliverables to their specific needs, that all the work be complete by April 1, 2016 and that the final document be given to the Alaska Greek Festival organizers.

Project plan

Initiation

Drafting project plan

The Alaska Greek Festival Project Management Plan was chartered November 20, 2015. It is included in the appendix and has had several revisions to address needs of the stakeholders. The largest change was the name. After completing research, it became apparent that what the organizing committee wanted was an event management plan rather than the originally chartered Best Practices Guide. The scope allowed for flex and did not need to be altered to allow for change, but the change management plan was used to properly account for the new name. This will be further discussed in the research section of this paper.

The project plan was drafted to be flexible to allow for this type of rapid shifting.

The plan covers all of the five process groups and ten knowledge areas. Cost Management Plan was added to clearly state that there was no funding because this is a research project, and because of that, no funds needed to be spent. Risk Management Plan follows a similar thinness, as there are only so many risks that were considered likely to happen.

Sections that are more robust are the Stakeholder Management Plan and the Human Resource Management Plan. This project relies on volunteers, who are all very busy. To show respect to them, the project plan clearly articulated standards of communication, requirements, and deadlines so that both the stakeholders who were volunteering their time to help create the Alaska Greek Festival Event Management Plan and the volunteers who sat on the project committee that oversaw project progress were treated fairly. Clearly communicated expectations allow everyone to know what is expected of them, and when they have to have it completed.

Greek Culture

Greek culture adds a layer to the complexity of stakeholder management that was used in this project. Greeks are famous for their cooking and their hospitality. This is why all across the world Greeks have Greek Festivals.

Greeks are animated and engaging people who have a strong sense of family and community.

Chaos and Order Muppets

There are two types of people in the world; Chaos Muppets and Order Muppets (Lithwick 2012). When it comes to most factors, the Chaos/Order Muppet dynamic is a great metaphor of how the Alaska Greek Festival has become so unbalanced; there are too many Chaos Muppets and not enough Order Muppets.

Chaos Muppets are the ones that run from crisis to crisis while the Order Muppets are the rigidly structured individuals that are always on time.

Currently, the Chaos Muppets outnumber the Order Muppets, and this imbalance is one of the reasons that the Alaska Greek Festival lacks structure; structure is antithetical to a Chaos Muppet. The event management is so chaotic that Order Muppets actively avoid participating, which is both a self-fulfilling prophecy and the cause of the imbalance.

Finding more Order Muppets, recruiting them to the festival, getting them engaged in the festival organization, and keeping them active will help to prevent this imbalance in the future.

The event management plan must thus be flexible enough to keep the Chaos Muppets engaged too, but set clear structure that allow for the inclusion of the Order Muppets.

Enterprise Environmental Factors

An enterprising environmental factor is a combination of internal and external factors that influence the project's success. The Alaska Greek Festival has many of these factors. The biggest one is the richness of entrepreneurship. Greeks are stereotyped as owning restaurants and diners because they do. They are willing to work, and they occasionally need direction. They have the drive to work hard to reach a goal.

A clear example of this drive occurred at the 2015 festival. The festival opens at noon on Sunday. Guests started arriving at 10. Therefore, the volunteers stocked the grills, started the coffee and got to work selling gyros, souvlaki and pastries. They realized they had guests, and they went to work. Church services were still being held, and some of the Greeks walked out from service early to start helping the guests.

Planning

Project plan draft

The project plan was drafted with the intent to be flexible enough to allow for quick reactions to stakeholder needs. The plan also had a change control process, in case there was a significant need that was identified, but was not covered by the scope.

The project plan contains several constraints to highlight the needs of the project stakeholders. The first constraint was that the deliverable is due April 1st, 2016. This was established to ensure that the final deliverable was ready for most of the planning process for the festival organizers to use in this year's festival.

The second constraint was that the scope could be expanded to allow for the needs of the stakeholders. This was clearly spelled out to make it very clear that the reason for this project is to be helpful to the stakeholders. The final deliverable needs to be something that the festival organizers can and will use to give structure to the festival planning and operations. If key needs are not addressed, the final deliverable will not be used and is not of use to the stakeholders.

The final constraint is that the budget can be increased, if needed. Luckily, the budget stayed at \$0. There were no scope changes that required funds, so there was no need to increase the budget.

Draft schedule

The schedule was created using MS project. It was created using a backward path method that started with known deadlines, and worked backwards to see when activities needed to be started. Estimates for activity task durations were based off previous experience in process analysis and creating best practices guides for non-profit organizations.

Over the course of the project, the schedule was flexible enough to allow for additional tasks to be added as required by both the academic requirements for the PM 686B class and additional requirements from stakeholders. The executed project schedule is located in the appendix for review.

The project was able to stay well within the SPI (Schedule Performance Index) of 1.0. This was accomplished by taking many breaks, or pauses, to prevent the project from being completed too quickly. Project variance thresholds were .95 and 1.1.

Drafting HR, Communication, Quality, Stakeholder Plans

The project relied on volunteers, and to show them respect, careful thought was put into drafting the Human Resource, Communication, Quality and Stakeholder Management Plans.

The Human Resources plan included job descriptions to clearly articulate the responsibilities of each volunteer. The volunteers had the opportunity to amend or request clarification before accepting these positions. A RACI (Responsible/Accountable/ Consulted/ Informed) Matrix was also created to clearly demonstrate who was required to do what activity. A calendar was also drafted to define due dates, for both the academic and project work. This was followed and allowed for the volunteers to know exactly when communications and submittals were due, as well as when responses were required to be completed.

This is where the Communication Management Plan and HR started to overlap to set those clear requirements and expectations. The Communication Management Plan relied heavily on the HR plan to set those expectations, and added additional information that reinforces the idea of respecting the volunteers who were donating their time and needed to be able to plan these tasks into their personal schedules.

The Stakeholder Management Plan also relied heavily on the HR and Communication plan to form clear requirements that allowed for the volunteers to participate in defined ways. The plan allowed for everyone to be treated fairly. It set clear deadlines and expectations for communication and involvement to demonstrate the need for inclusion for this project to be successful.

The volunteers were used in the Quality Management Plan to review documents for the event plan before the documents were submitted as drafts to the Chairperson and organizing committee. The Quality Management Plan also defined the thresholds for the Key Performance Indicators, the Measures for Project Process and the QA/QC mechanisms for the project. The QA/QC for the final deliverables was used to ensure a professional level final deliverable that actually creates the structure for the event planning for the Alaska Greek Festival.

Drafting and finalizing project plan

Once all the pieces were drafted, they were pulled together in one compiled document. That document was edited and refined to remove as much overlap as possible while keeping those clear expectations and requirements. The hardest part was getting all the parts to move together, as the formats did not merge as well as had been planned. This may seem like a minor issue, and it is, but it was still unexpected and added frustration to what should have been a seamless process.

Often the problem with MS Word is that there is a lot of background coding that creates these problems, and they can be tricky to address. It is something that is the unfortunate problem with MS word. While it can be extremely user friendly in some ways, it can be extremely annoying in others.

Executing

Research process

The research process for this project can be separated into three parts; literature review, a review of the Alaska Greek Festival documents and data collected at the 2015 festival and from other Greek Festivals across the United States, including a few in Canada.

The literature review was descriptive research of Greek and ethnic festivals and event management planning in general. The Alaska Greek Festival involved a review of their organizing committee's documents for the past ten or so years, along with some data that was collected at the conclusion of the 2015 Alaska Greek Festival. The data from the other Greek Festivals was collected from the websites to create a cross-comparison spreadsheet showing both the similarities and differences of these festivals. It also looked at costs for items, as well as determining if there was a clear mission or goal for hosting the festival.

Changes to plan

As with all projects, there were opportunities that occurred and were captured. These were mostly in completing the first few sections of the event management plan for the festival faster than anticipated. This allowed for the inclusion of the cross comparison spreadsheet. It was not originally part of the project plan but was added to give the project additional information as to how other festivals operate.

In addition, there was a change in the name for the project and the final deliverable. As the final drafts were being reviewed by the festival organizers, it became clear that while the information they contained was important, what they really needed was a fully developed event management plan.

These changes were documented in accordance with the Change Management Plan and can be found in the appendix, along with the executed project plan.

Adding the US and Canadian Greek festival spreadsheet

The cross comparison spreadsheet was created to inform the project on how other festivals operate, as well as can be viewed from their website. For the most part, the website lacked information on the operations, but had information on what their festival had to offer.

This information was collected in a spreadsheet and it will be reviewed in detail in the research section of this paper.

Project management vs. Event management

The move from a Best Practices guide to a full Event Management Plan was not done quickly. There was thorough review and assessment to see if it was possible within the timeframe, and with the resources that were currently being used to complete the new scope.

While there were no changes to the scope, and it could have seemed as simple as a name change, the documents that would be required to be created were more technical and highly specified to the festival, and would require more review and edits from the organizing committee to be useable. This will make the final deliverable more useful, and the stakeholders are willing to accept the pushed back deliverable deadline in exchange for a more useful final document.

It was unfortunate to have to push back the Substantial Completion date, but the project had a 20 day buffer to prepare for this type of possibility.

Stakeholder Management

Stakeholder Management was an important part of the project. While it is important for all projects, because this project was so heavily reliant on the assistance of stakeholders, from the festival organizing committee and the Chairperson, it became even more important. Without the support and involvement of the volunteers, this project would have been a failure.

The festival management has rotated many times over the years. However, it is the consistent presence of the same group of volunteers over that same span of time that has overcome the challenges of different management and no written practices. Most of the processes are not written down. Those same processes are actively debated every year to try to nail down some standard or set practice. It is this culture of involvement that prevents either a Best Practices Guide or Event Management Plan from being drafted with limited input.

Collaboration

Collaboration is critical because of the stakeholders. It's their festival, being managed and run by members of their community, and the document that defines and clarifies all of the work that goes into the festival must use collaboration to create it. Otherwise, the plan will be missing 20 years of institutional knowledge located in the ears and minds of the people who have dedicated decades to working the festival.

Collaboration also allows for an important factor in creating a useful final document. Collaboration creates buy-in for the final product. It's not an edict from on high; it's a document that they helped write, and reflects their values and culture.

Monitoring and Controlling

Earned Value Metrics

The Earned Value Metrics (EVM's) that were documented to monitor this project were a percentage of missed milestones, a percentage of overdue project tasks and the Schedule Performance Index (SPI).

Thresholds were set to assure that a variation could happen within a certain range without cause for alarm. For SPI this was set at .95-1.1. There is a constraint that sets the deadline for the completion of this project because the festival happens in August, and the organizing committee needs the final document to complete the implementation of the event plan.

For milestones and overdue tasks, the threshold was set at 34% of total tasks. Tasks sometime slip, and while there was a lot of slack in the first half of the project, the time line for the second half was very tight. The threshold was set at 34% to allow flexibility for tasks, which can be remedied quickly with additional resources or re-scoping the project. There were only 8 milestones in the original project plan. More than 3 slipped would have triggered a response to put the project on hold, a meeting with stakeholders and the advisory committee to create an Action Plan to address the slippage, and determining if the final deliverable can meet the final deadline, or assessing what changes would be required to meet the deadline.

Documenting Project Progress

Progress for the project was measured by using those same measures to make sure the project was progressing at the expected rate. Reporting periods corresponded with status report dates. The progress updates provided a set date to complete the necessary assessment of the project, and needed to be calculated for the status report. That data was then copied and transferred to a Project Process spreadsheet to be added to a timeline. The timeline gave a quick visual of project progress over the life of the project.

The project was constantly in the green. There were not any missed milestones, or overdue tasks at the time of reporting. The SPI was 1. In order to keep the project at 1, there were several pauses that were activated when work was completed faster than anticipated. This typically corresponded to review and edit time during the first half of the project.

Managing change

This project had two changes. The first was the inclusion of the cross-comparison spreadsheet research of Greek Festivals across the United States and a few in Canada. The second was the name change from "Best Practices" to "Event Management Plan," and the requirements for the final deliverable evolved and grew to meet the needs of the festival organizers.

Those changes were handled beautifully thanks to the change management process. These changes can found in the appendix.

Managing time

Schedule management was very important to this project for two reasons. The first was that the final deliverable was needed as soon as possible to assist the festival organizers in organizing the festival. The sooner the final deliverable was done the sooner they could begin using it. The second was that the academic requirement of this program set the deadline for the completion of the work around mid-April.

Since time was such an important factor, SPI was tracked throughout the project to monitor the project progress. Missed milestones and overdue tasks were also tracked to help monitor time.

Closeout

Closeout Check List

A closeout check-list was used to assure that all the work had been completed before turning over the final deliverable. The check-list reviews all ten of the knowledge areas and asks a series of questions relating to the completion of each of these knowledge areas. The checklist asks a series of questions related to the knowledge areas to confirm that the change process was followed and documented; that risk, their impacts and the response were documented, etc.

A copy of the close out check-list is in the appendix.

Lessons Learned

The largest variation, and thus the largest lesson learned, was the turn that took the project from a Best Practices Guide to a full-blown Event Management Plan. This happened because of the lack of assessment during the initiation phase of this project. While the project sponsor was supportive of the project deliverable and was excited about any deliverable, it became clear as the project progressed that there was no defined practices, and thus there couldn't be any practices to shift through to find the best practices to set as the standard.

The differences in expectations became clearer as the project progressed into reviewing the deliverables that were created with the Chairperson and festival organizing committee. They were happy with what was produced, but they needed more structure and more tools. These tools and structure were missing, and now that they were available, the plan will allow for the festival to be managed with less stress and more effectively with volunteer's time.

A full recap of the lessons learned from this project is located in the appendix.

Was the project successful?

The Critical Success Factors were meeting milestone deadlines and receiving access to the Alaska Greek Festival digital drop box with the festival materials. Both of these were met, so this project can be declared a success.

These two Critical Success Factors were selected because they relate to the time constraint on the project and to the necessary requirement of being given access to the festival documents. Without access to these documents, a final

deliverable could have been created but it likely would be so generic that it would not be particularly useful to the festival organizers.

Key Project Management Knowledge Areas

Stakeholder Management

Stakeholder involvement was critical in their project, so Stakeholder Management was chosen as one of the focus areas for this project. As a focus area, it was tracked in a separate spreadsheet to assure that it was properly managed.

After some trial and error, the method for tracking stakeholder involvement was defined as measuring the number of opportunities for stakeholder involvement. This would allow for open access to the project for questions, comments of concerns, and to take in information on the festival. It created an avenue to allow for project buy-in to stakeholders who might not otherwise be able to be a part of the project. It was also an opportunity to gauge resistance for the project and possibly help move stakeholders from resistance to neutrality.

The details are located in the appendix for this and all of the Key Project Management Knowledge areas.

Communication Management

Communication Management was also selected as an area for focus to assist with Stakeholder management. Communication is key to stakeholder management. This was selected in part to prevent concerns or unmet needs coming from the stakeholders. The method for measuring communication was that there would be a maximum response time of 72 hours for communications from stakeholders.

Not all communications required response, but of the ones that did, all were responded to within the 72 hour time period.

Quality Management

Quality Management was chosen specifically because the Alaska Greek Festival lacks metrics. QM was selected to assist in assuring that the project would be held to certain standards, and thus create a quality final deliverable for the festival organizers, and to do some initial analysis of process flow for the festival to help the better utilize their limited resources.

The use of Lean tools was used to measure Quality Management. They were used to document process flow, and to attempt to draft up future process flow options for the festival organizers to review as possible solutions to problem areas.

HR Management

HR Management was giving this additional focus because the stakeholders who were involved were people volunteering their time. The method for measuring was counting the number of late submittals, over the total number of submittals.

Since the main constraint for this project was time, tracking the timeliness of submittals was chosen to help keep the project on track and to maintain the expectations that were outline in the HR Management Plan and the submittal calendar.

Research

Research Methodology

Empirical Literature Review

The initial research proved that there is very little information on Greek Festival management panning. There was very little of any kind of ethnic festival event planning research. There was one Journal Article that looked at Greek Festival event management, the “20th Anniversary The festival was held in 2002, and a follow-up study was done in 2012 at the festivals 30th anniversary. That article was only available for purchase, so it was not reviewed. Ethnic festivals, as a means of promoting and celebrating cultures, are still learning to apply formal event management tools and techniques, so there is a lack of literature on the subject (Gargalianos, Spiropoulos and Sotiriadou 2005).

The Sydney Greek Festival, located in Sydney Australia, hosts 26 events across 10 locations. It is significantly larger than the Alaska Greek Festival, but still experiences similar struggles with event management. The article explains that “festival organizers have increasingly identified strategic planning process and stakeholder management as critical components for successful events” (Gargalianos, Spiropoulos and Sotiriadou 2005).

The biggest problem that the Alaska Greek Festival is that “events struggle from year to year and their planning ends up being very much like a one-time project” (Gargalianos, Spiropoulos and Sotiriadou 2005). Since this is a one-off event each year, there is little motivation to document future planning. This lack of future planning is also shown with the lack of strategic planning. The article drives this point home “strategic planning does more than set goals and ways to achieve them. It continuously monitors the environment, anticipates forces that will act on the organization and the event, and devise and refines strategies” (Gargalianos, Spiropoulos and Sotiriadou 2005). If the festival organizers could stop running from crisis to crisis, stop thinking of the festival as one-off events, and start setting up the documenting the process they use, they could save themselves stress and burnout for the festival organizers.

According to the article, “the unique nature, strategic planning processes of ethnic festivals may be complicated” (Gargalianos, Spiropoulos and Sotiriadou 2005) in part due to the past history of success, despite the problems and chaos from the previous years.

Strategic planning for ethnic festivals need to follow three steps: first, create a mission statement of the organization. The second step is to identify goals and stakeholders, since stakeholders are the both the people and the culture that

event is focused on and the people who are coming to the event. The third step for strategic planning is doing an environmental analysis and a SWOT Analysis (Strength, Weaknesses, Threats and Opportunities) (Gargalianos, Spiropoulos and Sotiriadou 2005). Strategic planning, if done correctly, can create a strong foundation for festival planning to be created.

Technical Literature review

With the second change that moved this project from a Best Practice Guide to a full Event Management Plan, technical research of event management was done to review and assess the tools and techniques of event management planning, a topic that has thousands of books, articles and websites devoted to the subject.

According to the “Festival and Special Event Management” by McDonnell, Allen and O’Toole, planning is the process which “consists of establishing where an organization is at present, where it is best advised to go in the future, and the strategies or tactics needed to achieve that position” (McDonnell, Allen and O’Toole 1999). “Event management is made up of a number of management areas... {that} continuously affects each other over the event life cycle’ (McDonnell, Allen and O’Toole 1999). Project management can be used to integrate these areas to meet the goals and objectives of the planned event.

They also say that the book was designed to be a tool for festival organizers to use to create better understanding of how to manage large annual festivals. They argue that festivals success depends on effective planning, which in turn requires defining measures and then measuring with those measures. Success requires both a defined measure and a measurable outcome. If there is not, than how could a festival organizing committee ever know if they were successful or not. Or what needed to be improved? Measures are an important and often over looked tool in festival management.

Festivals and other special events are successful due to the enthusiasm and support of their organizers, rather than a well thought out risk management plan, or marketing plan. This is in part due to festival organizers not drafting these types of documents, but rather actively engaging everyone they meet on the wonders of their event (Gursoy, Kim and Uysal 2004). Organizers may resist that level of formalizing because they are concerned about creating a business like atmosphere that runs counter to their festival’s norms and culture.

Innovation is also important to measure at festivals and for similar reasons (Calsen, et al. 2010). Festivals are often run by non-profits or local community organizations who may not have the funds to do things in the same way and often rely on innovation to come up with create solutions and services for their guests. There innovations add value to the festivals, but it is not measured and therefore impacts are not well understand. The festival can start using measures to documents how these innovations affect the festival and can improve their performance.

In order to define the innovations and their impacts and to create a system and a culture that values measurements, the final deliverable will thus looked like a combined project management/ event management system to create a better event plan.

According to Judy Allen, writer of “Event Planning”, there are five design principles that should be considered when planning an even (Allen 2009). They are as follows:

1. The Elements- All the parts that make up the event
2. The Essentials – Must haves
3. The Environment – Venue and styles
4. The Energy – Creating a mood
5. The Emotion – Feelings

These are different than the five project management process groups, Initiating, Planning, Executing, Monitor& Controlling and Closeout, which encompass the lifecycle of a project. The five design principles are addressed during the initiation of an event. The process groups and these five design principles can be used together to create a more meaningful event plan as long as the remaining 4 process groups are still followed.

The first step in initiation of an event is to visualize the requirements. These five design principles help to guide and inform the process. Events are complex and often quick events that need a high level of advance preparation to be successful. By using these five design elements, the event can be visualized at a high level, and that high level overlook can be used to start narrowing down and defining the event plan.

In “Professional Event Coordination”, Julia Silvers talks about the initiation and planning process groups in a different way. She talks about doing a “need assessment” (Silvers, Professional Event Coordination 2004) the what, when, where, who and why and using that information to do a feasibility study to answer both how and how much. Once this is answered, deeper analysis can be done to see if the outcome envisioned is achievable.

Further analysis looks at resources, both what is needed to achieve the event and what is available. The primary difference between event management and project management is that the event date is fixed, and not flexible. In project management, the process will determines the completion date, while in event management, the date determines the process (Silvers, Professional Event Coordination 2004).

Silvers also created a PowerPoint on The Event Management Body of Knowledge to show how complex event management can be. The biggest and most appropriate to project management is the Phases: Initiation, Planning, Implementation, Event and Closure. (Silvers, Introduction to EMBOK: The Event Management Body of Knowledge 2007)

As seen below, the phases are one part of a very complex event management system. While those other areas are relevant to event management, since this project is based off project management, these will be noted here, but left off the final deliverable.

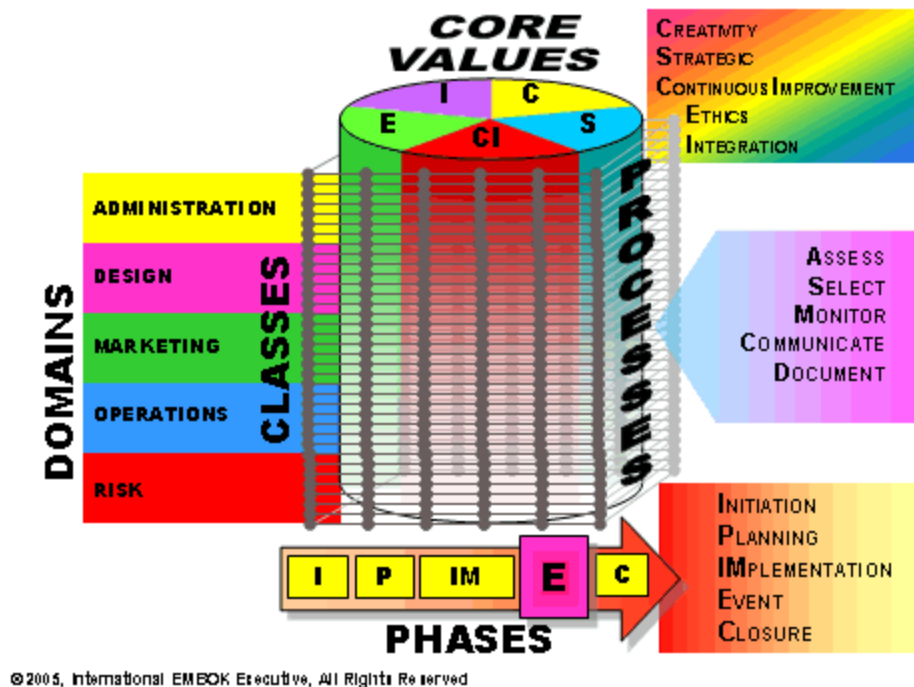


Exhibit 1: EMBOK Processes

Silvers, Introduction to EMBOK: The Event Management Body of Knowledge 2007

The “Festival and Special Event Management” by McDonnell, Allen and O’Toole uses a similar set of Initiation, Planning, Implementation, Event and Shutdown phases, but with knowledge areas of Scope, Marketing, Finance, Time, Design, Risk, Procurement, Human Resources, Stakeholders and Communication (McDonnell, Allen and O’Toole 1999).

This version is more aligned with project management process groups and knowledge areas, but lacks any sort of matrix that shows the outputs of these processes or how they are work together to management the event.

Greek Festival Best practices guide will use a mix of these two versions, with project management to fill in the gaps. It will contain process groups of Initiation, Planning, Implementation, Event and Closeout. It will pull from the Wiley Tourism Series and EMBOK to fill in any gaps that are missing from traditional project management tools and to meet the needs of festival organizers.

To prevent failure of events and festivals it is necessary to “implement a framework to assess stakeholder satisfaction and incorporate stakeholders throughout the planning process” (Anderson 2008). Stakeholders are the people upon which the event depends. Those stakeholders are the volunteers, the customers, sponsors and the community at large.

The event management is relevant to this project because of the specific needs of the festival organizing committee. Application of event management processes in creating the plan requires significant stakeholder involvement, to not overproduce complex tools that will never be used, and to tailor the tools they need for the festival.

In “Festival Management: A Case Study Perspective” showed that many festivals have similar areas of weakness as the Alaska Greek Festival. They all have unique challenges, are mostly run by volunteers, and may not have much training or expertise. Few of the festivals studied “were engaged in goal setting, marketing, strategic planning, and organized fundraising ventures and accurate measures of attendance and economic impacts were not available” (Wendy Frisby 1989).

Festival management has five stages of growth (Wendy Frisby 1989)

1. Origin
2. Informal organization
3. Emergence of leadership
4. Formal Organization
5. Professionalization

Most non-profits will not achieve the 4 or 5 level of growth. Some resist moving to the 4 or 5 level because of concerns about losing community involvement or becoming overly commercialized.

The article did define several recommendations for festival managers including creating realistic short and long term goals and defining a human resource management plan for managing volunteers.

Lean Six Sigma Research

Lean and the Search for Efficiencies

For future planning of the Alaska Greek Festival, the festival organizers must do some deep thinking, and begin to define the goals and purpose of the Greek Festival, so that they can develop the methods for data collection and see if they are meeting these goals. While developing this data collection process, they ought to use Lean Six Sigma to help them create a better experience for their guests and their volunteers, and to find efficiencies for their limited resources (such as space, volunteers, donations).

Lean Six Sigma is a combination of both Lean and Six Sigma principles, processes and tools. Lean is meant to increase efficiency. Six Sigma is about minimizing defects down to 1 out of a million products or services. Combined, Lean Six Sigma is about creating efficiencies and minimizing defects. (Harver 2015)

Lean Six Sigma is the process of minimizing waste (Harver 2015). Waste is defined as Downtime, Overproduction, Waiting, Non-utilized talent, Transportation, Inventory, Motion and Extra Processing (Harver 2015). It can also be viewed as anything that doesn't bring the customer value. That's the view the festival organizers should take; eliminating products and services at the festival that don't bring their guests value. These wastes can cost time, money, talent or product.

Because waste can be anything that that doesn't bring the customer value, everything must start with the customer (George 2002). Festival organizers should try to create a data collection process that defines what brings their guests value; anything not on that list is thus something that doesn't bring the guest value. That list should then be used as the guide for creating the data collection process.

Seeking Customer Value

For events and festival "success and survival depends on an organization's ability to provide wealth, value or satisfaction for all its primary stakeholders" (Anderson 2008). The festival organizers will need to spend time defining what does bring their guests value so that they can improve what does bring guests value and eliminate that which does not. This will create happier guests who are getting good value or experience.

The process that has been selected to be implemented in the event management plan for the Alaska Greek Festival is DMAIC (Define, Measure, Analysis, Improve and Control) which is the process that must be followed to properly use any of the Lean Six Sigma tools and techniques for eliminating waste or increasing guest value.

DMAIC is the process that Lean Six Sigma uses to do process analysis. Teaching the full process and all the tools involved can take weeks (George 2002) so this paper will only have a brief overview of how it will be applied to the Alaska Greek festival.

Define: The define step in the DMAIC process is where the festival organizers will need to clarify the goals and objectives of the festival. They will need to define why they are doing this, because they need to have a strong connection to why they are doing this to establish the kind of culture within the festival that values doing this extra work. It is more work, and it's work that other people may not see value in doing.

They will also need to define what brings value to their guests and what doesn't so they can continue with the process.

Measure: What can't be measured can't be managed, and right now what the festival measures is revenue. The festival organizers will need to use those defined goals, and defined guest values to build a data collection method that measures what does and what does not bring their guests value so that can initiate that data collection process, to the defined process, and start gathering data.

Analyze: That data can then be analyzed to define the process and capacity of those things that bring value to the guests and opportunities for improvement can be assessed. It is also when those things that do not bring guests value can be assessed for elimination or improvement to something that does bring guests value.

Improve: Once the festival organizers have reviewed the data, they can start working possible solutions. Those solutions or improvements can be done at the next festival.

Control: Defining and setting the new processes and data collection process for the next festival. The festival organizers will have comparable data from year to year, and can see if any of the changes that were decided had the impacts they were expected to have, either increasing customer value or eliminating waste.

The DMAIC process is iterative, so this is not the last step but rather the last step before it goes back to the beginning. DMAIC is a continuous process, so once it has been applied to one issue, it can be applied to that issue multiple times for continue process improvement, or used elsewhere in the festival. Diminishing returns can present a problem with this type of process, but that's almost a good problem to have: it means that the waste issues one has are almost not worth dealing with because they are almost too minimal to use for data collection.

The festival organizers should use Value Stream Mapping to help measure where value produces by a service (George 2002). This map is a visual representation of the process involved in creating a good for the festival guests. It should be created in two parts; a current status map and a future state map. The current state map should show where there is waste and opportunities for increasing guest value, and the future map should show fix eliminate the waste and increase the value. Value Stream Mapping can find 20% waste, which can be eliminated, creating or giving back value to customer (George 2002).

Research Analysis and Discoveries

The research section of this paper demonstrated that there is limited professional research on ethnic festivals, specifically Greek Festivals, and that the final deliverable will be created with a mix of event management tools and project management processes to create structure for the Alaska Greek Festival.

Alaska Greek Festival Observations

Greek Festival Observations were taken on the last day of the festival in 2015. These observations were impromptu and not scientific. They were observations and should be taken with a grain of salt. They have been included in the research portion of this paper to demonstrate how data could be taken at future festivals and how Lean Six Sigma tools and techniques could be used to develop process that is more efficient and eliminate waste, while adding value to the guests.

The research also goes into some limited examination, based on observations from the 2015 festival, that reveal the Gyro/ Souvlaki stand as the busiest booth and the most potential for improvement. This will involve the use of Lean Six Sigma tools, such as the DMAIC process and Value Stream Mapping to create a future state that eliminates guest wait time for paying for their food, and a general review of the whole process for other places of waste and bottlenecks.

Line size by booth

Questions that should be addressed when looking for adding value to the guest and eliminating what does not bring them value is identifying which booths had the longest lines. This will help to define the problems and focus on areas that are issues. The longest line on Sunday was at the Gyro/Souvlaki stand. It is most likely the most popular booth.

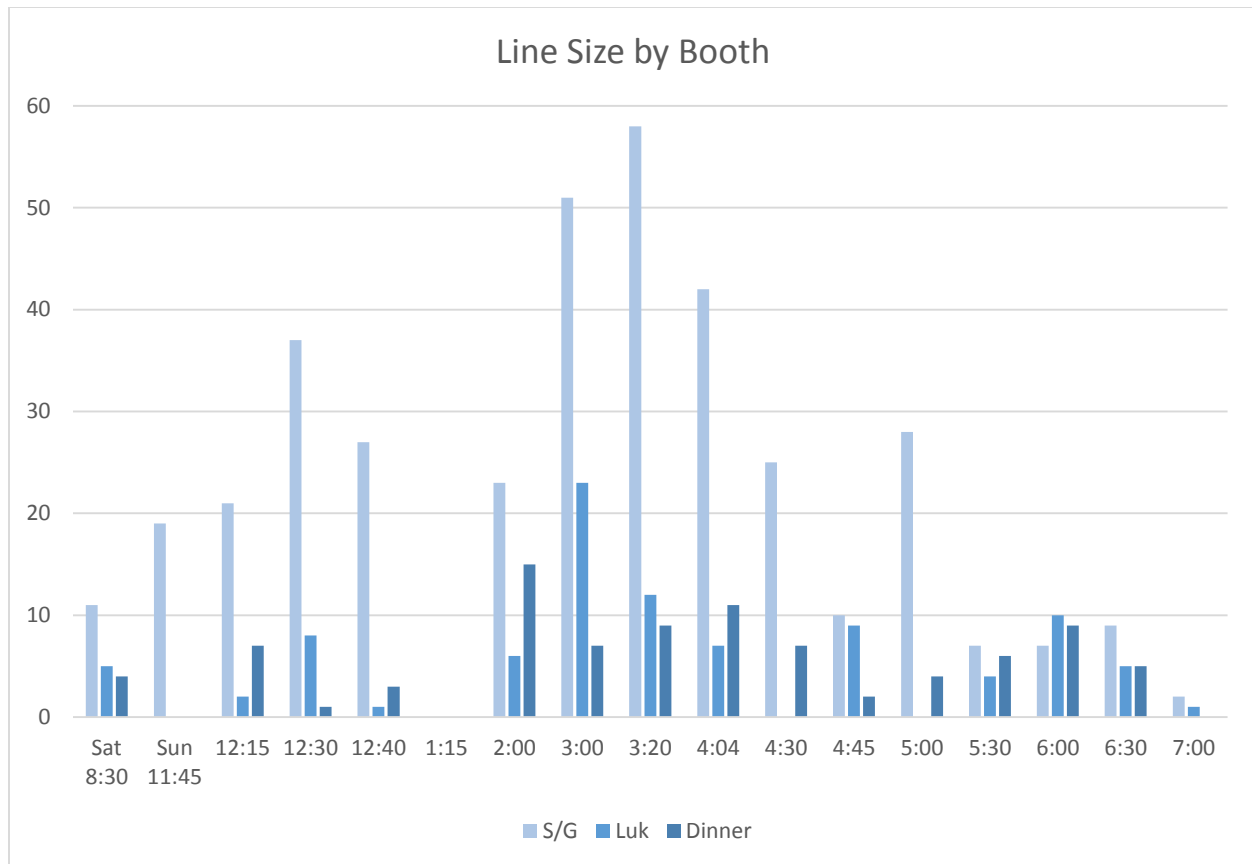


Exhibit 2: Line Size by Booth

The other two booths with lines long enough to measure were the Dinner booth and the Loukoumades booth. The other booths were able to manage to keep lines down to low levels that would not be visible in the graph.

The peak time can be seen on this graph as well. The peak time measured on Sunday was 3:20PM. This is important information to help with having enough materials prepared and volunteers to help staff the booths.

Wait Time at Gyro/ Souvlaki Booth

Looking closer at the Gyro/Souvlaki booth we can see a strong correlation between the number of people in line, and the length of time guests are waiting in that line. We can see that the max time wait for guests was 16 minutes, with more than 60 guests in line.

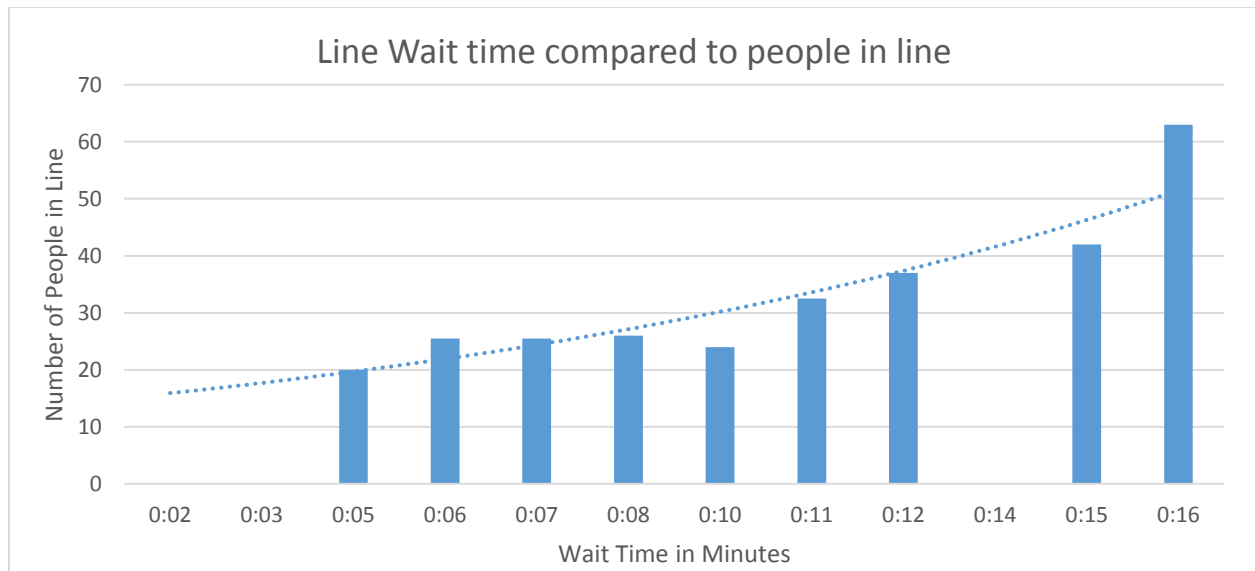


Exhibit 3: Line wait time by number of people in line

This gives us an average of pushing through guests at a rate of one per 16 seconds. This shows that they are sending out gyros and souvlaki at an incredible rate. A rate that is unlikely to increase, but it could be possible to set up a better process flow, not to speed getting people through that line but by getting rid of the line.

Length of Time from Ordering Gyro to Receiving to Leaving After Paying

In conversation with members of the festival organizing committee, there was a strong consensus that there were two main reasons that the gyro/ souvlaki booth line was always the longest. First is that the Gyro/Souvlaki booth is the most popular, in part because it's more like typical fair food. You can eat them with your hands, and you can walk around while you eat. The second reason is due to booth set-up configurations.

The booth is set up in a way that the guest walks up to the counter, orders places their order, and moves down the line towards the cashier. As can be demonstrated in the graph above, gyros and souvlaki are being handed out at a rate of 1 per 16 seconds. The bottleneck point is the cashier. The time it takes to go from ordering to being able to leave with the product can be anywhere from a few seconds if there is no one in front of them and they are paying in exact change, to several minutes if the cashier is processing a credit card.

The chart below is a tiny sample size of seven guests, taken at the height of the festival on Saturday at approximately 7:00 PM. The line was so long that it blended in with the other lines and could not be accurately measured. In observing the staff at the gyro/ souvlaki booth, it was quite clear that volunteers could push out food as ordered at a stunning pace, but had to constantly stop and wait for the two cashiers to catch up.

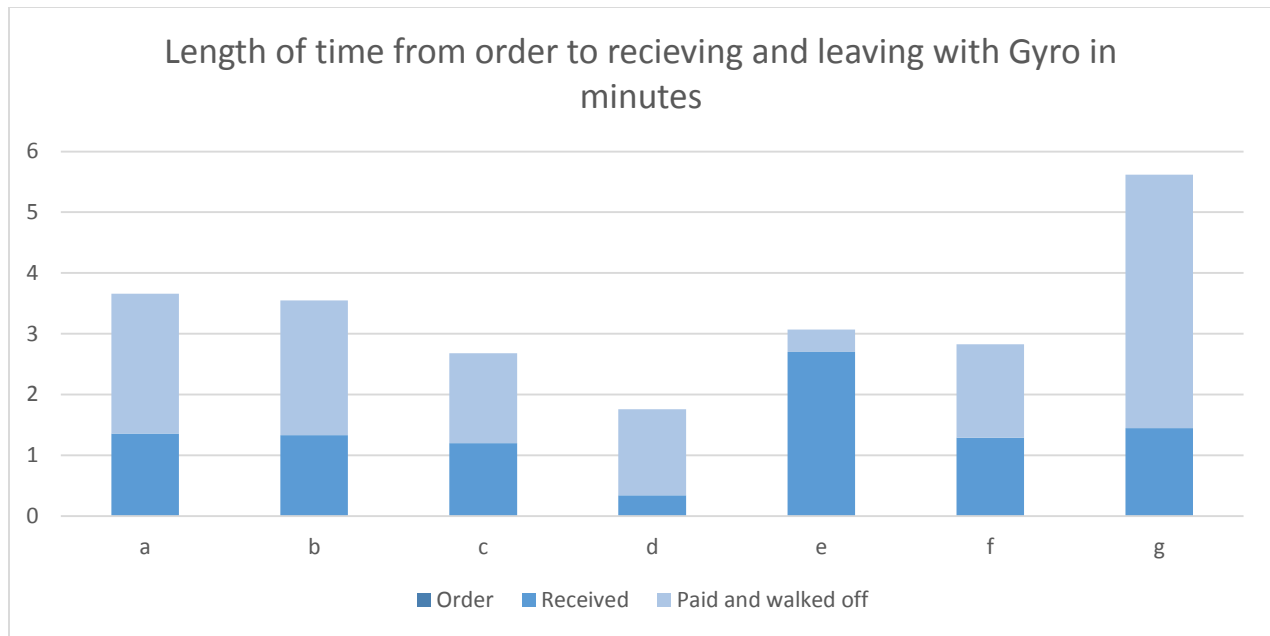


Exhibit 4: Length of time for Gyro

This is a significant problem, and it is one that will require creating future process mapping to develop a solution. There are many factors in play that add to the complexity of this and will require leadership and involvement from the people who staff the booth every year.

This issue is one of the most noticeable problems at the festival, and was the one that had significant number of complaints. Guest claimed to have waited 40 minutes in line to get a single gyro. This was not measured, so there is no data to support or refute the claim, but in observing the mess that was the gyro/ souvlaki line Saturday night, it could accurate. This is an obvious place to value stream map, and utilize other Lean Six Sigma tools, to eliminate the bottleneck and remove the waste to the guests.

Booth Income by Year (2013-2015)

The booths at the Alaska Greek Festival are managed by booth leads, who organize staff to help man them during the festival and are the heart of the Greek Festival. They are what bring in funding, and are one of the main reason guests return year after year.

The financial process at the festival breaks down income by booth, and this allows for deeper analysis of how much business each booth is doing. This data is broken down by both booth and time. The financial staff have set times that pick up cash from the booths, and document it accordingly. This can be used to provide analysis of how much cash is being handled by each booth day by day and cash drop to cash drop.

The festival organizers requested that for security and privacy reasons, details of when and how much cash is being moved around not be released to the general public. Therefore, the graph below lacks the defined Y axis. It is still

possible to see the grow trend that occurred of the three previous Alaska Greek Festivals, and that the Gyro/Souvlaki both is the most popular booth.

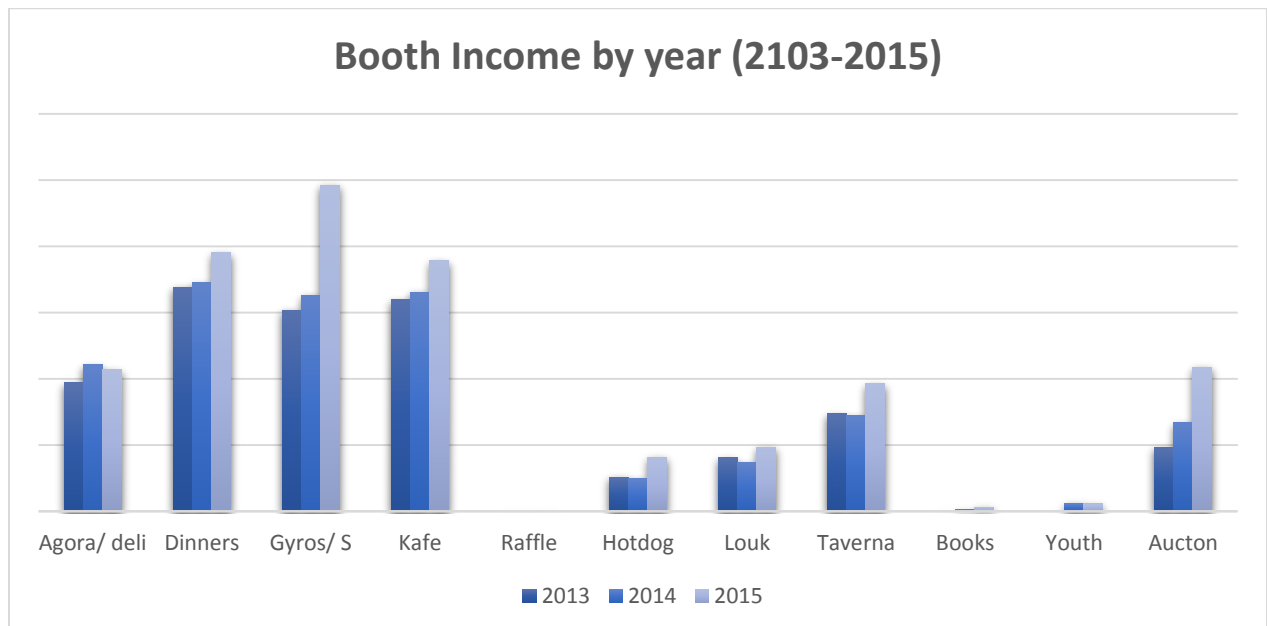


Exhibit 5: Booth income by year

The graph has a general trend upwards, and there is a clear jump beyond what could be expected for 2015. Last year, the festival experienced sharp gains in revenue. Festival organizers say it was their highest grossing year, and may never be topped.

Part of the reason for this project is this growth. The festival organizers have hit the peak of what they can achieve without formalizing the event planning. The festival is run by volunteers who divide out tasks amongst themselves. While this has worked, more or less, over the past 20 years, they cannot manage a project at this level of complexity without creating structure and formalizing the processes involved.

Booth Income in 2015

Diving a little further into the question of what brought in the most funds at the 2015 festival, analysis can be done to see the overall impact that each booth has the revenue brought into the festival. This graph, as the graph above does not include funds that are involved with the car raffle. The raffle selling off a new car requires a gaming license from the State of Alaska, and must be managed separately so it will not be addressed as part of the festival management. Due to this, the car raffle will not be reviewed at this time.

The pie graph below breaks down the total revenue brought into the festival, and divides it as a percentage of the festival. Since the festival does not currently count attendance, count or monitor the number of guests who visit the booths, this will be used as an imperfect method to assess the use rate of the festival booths.

Activities such as the Church Tour or Cooking Demonstration have no data because they do not bring in revenue directly, so they cannot be addressed in this analysis.

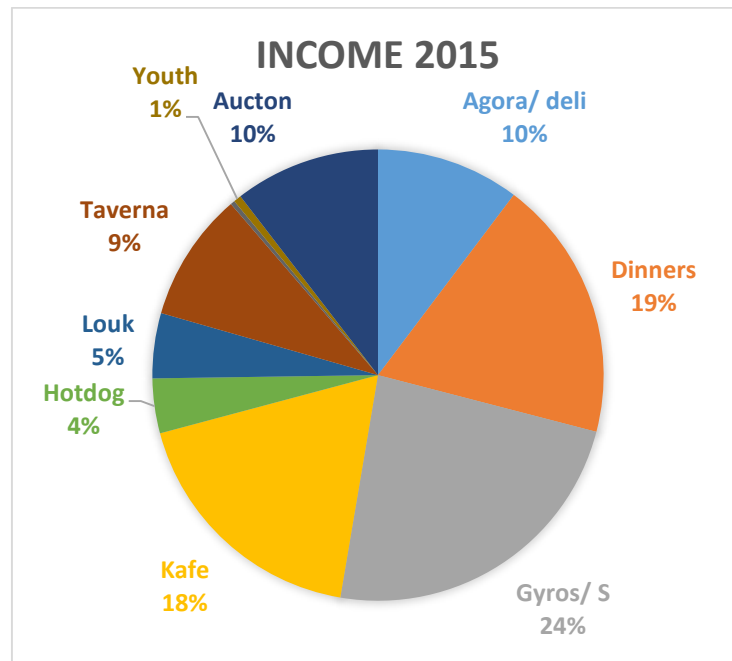


Exhibit 6: Income by booth 2015

This graph shows that the busiest booth is the Gyro/ Souvlaki booth, followed by the Dinner booth and the Kafe. This is not the most effective way to represent the data because the average price at each of these booths varies wildly. The Gyro/ Souvlaki booth only sells gyros and souvlaki. They are each \$8. The dinner booth sells a variety of foods ranging from \$10 to \$22. The Kafe sells coffee and pastries, ranging from \$4 to \$25.

When deciding on the use of Lean Six Sigma, it's important to know data on the subject so that further analysis can be planned. Since the data available on the Alaska Greek Festival is limited to observations made on Sunday related to line size and revenue brought in, future data collection will need to be expanded. This will involve defining the purpose of the data collection to formulate what needs data needs to be collected. Once this is complete, the Alaska Greek Festival organizers will have much better data to use in process analysis.

That process analysis can give them the answers to problems and issues that they are not currently aware of, and can be used to create a better experience for their guests by eliminating waste, and creating additional value.

Greek Festival Cross-comparison Spreadsheet

The Greek Festival Cross Comparison spreadsheet was added to the project to give the festival organizers some additional information to show the similarities and the differences between the Alaska Greek Festival and other

festivals across the United States and several in Canada. This spreadsheet was created using data that was posted to the individual festival websites and was often missing information.

As much data as possible was added to the spreadsheet. This spreadsheet was not the focus of this paper or the project, and was not necessary evidence to either prove or disprove any claim, so the missing information was left blank. All conclusions should take into account that data is missing.

This data is to be viewed simply as comparing and constraining what information was available for different Greek Festival. No deeper conclusion can be accurately determined.

Where are Greek Festivals?

The easiest and most complete section of data for the cross comparison spreadsheet was the locations of where the festivals were held, by state. Below is a heat map of United States, showing the number of Greek Festivals held in 2015.

California has the most with 44 Greek Festivals, and several central states appear to have hosted no Greek Festivals in 2015, or at least ones that did not have websites or Facebook event pages. It is possible that they did have Greek Festivals and they were buried in the search engine, or had deleted their event pages from Facebook.

The heat map is a quick and bright visual of all the festivals whose websites were used in this research. For a complete list of all the festivals that were reviewed for this research, the raw cross comparison spreadsheet is located in the appendix.

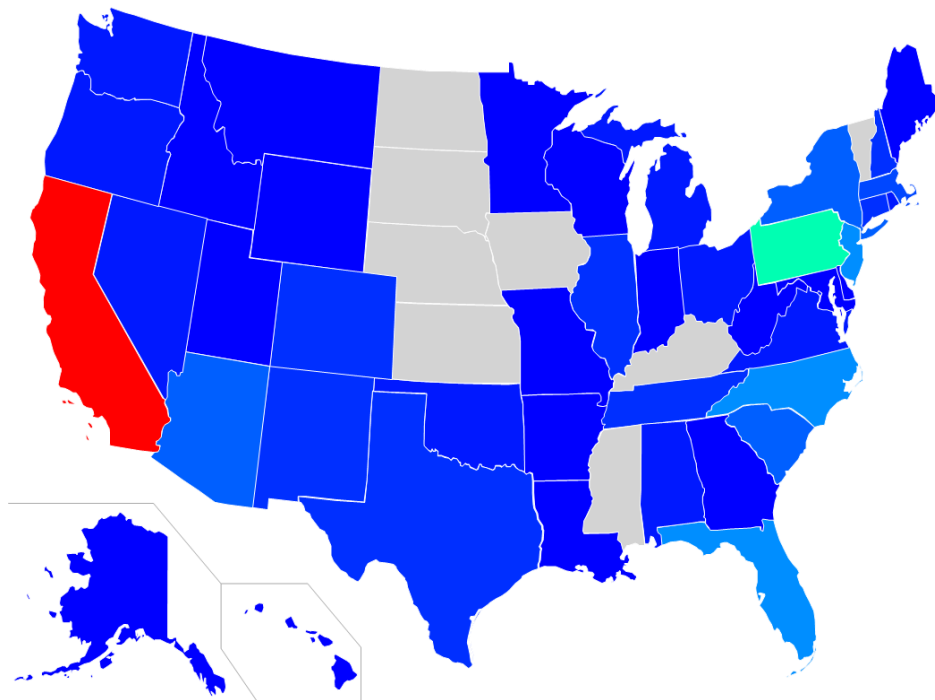


Exhibit 7: Heat map of researched Greek Festivals

This graph shows that there is a noticeable split that has more Greek Festivals on the coasts, and less in the center.

Further research could go into more detail and divide this up by per 100,000 people or overlay this heat map with a heat map of the Greek diaspora, noting where Greeks live in America. It is possible that the central states, like Alaska, do not have the population to support or run Greek Festivals large enough to have a website operating year round.

Average Length of Festivals (In Days)

The second most complete data was the number of days the festivals operate. Festival dates were clearly stated on the websites and were easy to count to get the number of days the festival is open.

The most common length for festivals was 3 days, often on a three day weekend. This can be seen in the the raw data. The graph that showed this was so overwhelmingly disproportionate that it was not worth including in this paper. Out to the 158 festivals researched, 95 of them were held over three days. This is the same number of days as the Alaska Greek Festival.

Time of Year Festivals Held

Festivals happen throughout the year, with most appearing to occur in early spring and early fall. No data could be found for festivals held in January, March, April or December. Several websites did indicate that the Greek Orthodox Church typically sponsor the Greek Festivals, host either a baklava fundraiser or other event to raise funds in December, but this was not tracked.

This is similar to what happened in Alaska. The Church sponsors the Alaska Greek Festival, hosts a baklava fundraiser in December, a Greek Gala in March and the Greek Festival in August.

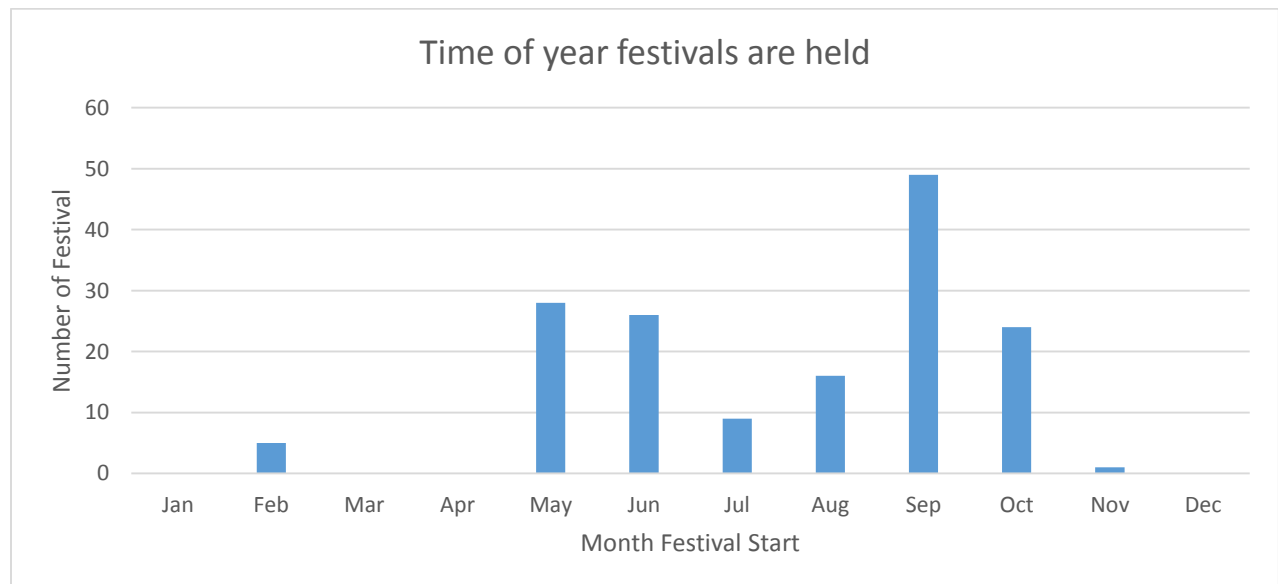


Exhibit 8: Time of year festivals are held

Average Age of Festivals

The average age of festivals was much harder data to find. Festivals didn't post the age of the festival as readily as expected. Some of them did have pages on their website that listed the year of the first festival and could be used to determine the current age of the festival. The graph looks oddly bell shaped, despite the missing data.

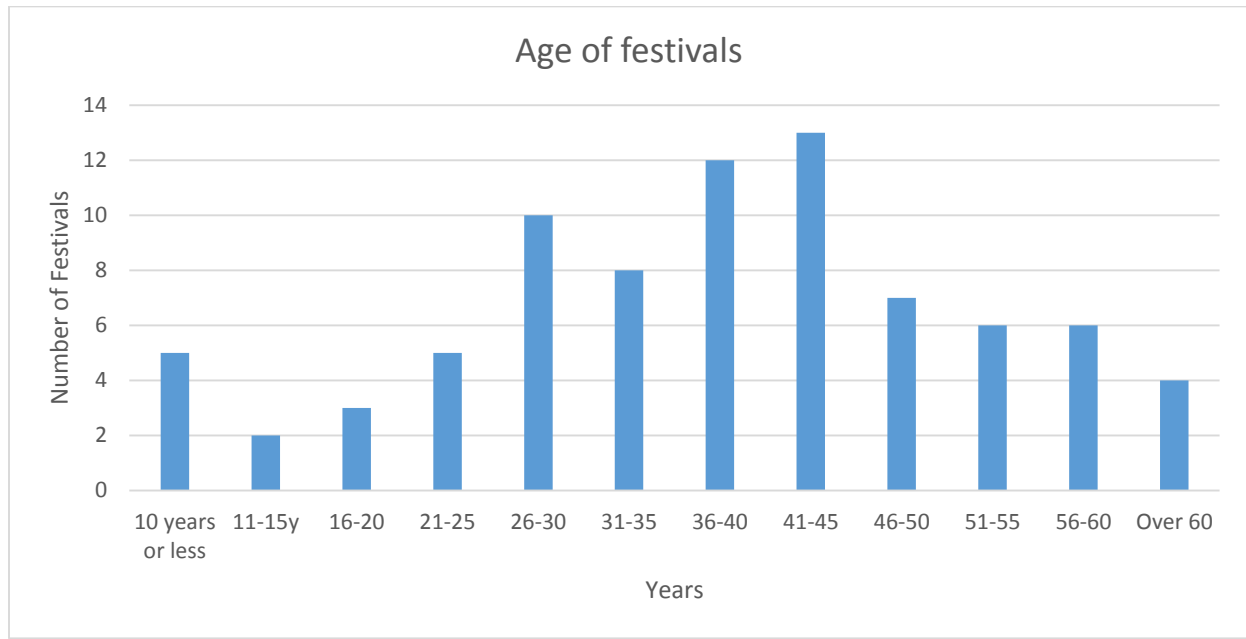


Exhibit 9: Age of festivals

The data of course is not complete enough to draw many conclusions. Of the 158 festivals reviewed, only 81 of them listed the age, or could be calculated from the festival history information.

The 2015 Alaska Greek Festival was the 20th iteration of the Alaska Greek Festival. That put it on the left side of this bell curve, possibly indicating that once a Greek Festival has been established for some period of time (an idea for further research) the festival will simply continue for decades to come.

Average Number of Visitors

There was not enough data on the website to look at the average number of visitors to the Greek Festival. Only 15 out of 158 festivals had any data listed on their websites.

This appears to highlight a similar issue that the Alaska Greek Festival is experiencing. There is no one counting how many people are coming to the festival. This lack of data means that nothing can be attributed to visitor numbers. People may or may not attend Greek Festivals, but until there are solid numbers, conclusions cannot be acutely attributed to number of visitors.

Comparison between Age and Number of Visitors

This lack of data is unfortunate, as the original research plan included a scatterplot of these two variances, number of visitors, and age of festivals to see if there was a strong correlation between the variance. It would also be interesting to see if overtime the same numbers of people attend the same festivals.

If so, that could be a strong indicator of loyalty to attending the yearly event, or a max capacity issue. That would be very interesting data to see, but the websites do not have enough information to draw any conclusions.

Food Prices

Food prices in Alaska are typically higher than in the rest of the United States, except Hawaii, and for the same reasons; limited population size and long shipping distances.

This part of the cross comparison spreadsheet had enough data to present averages, but should not be used as reasons to either increase or decrease the prices of the food items offered at the Alaska Greek festival. The prices are from 2015 festivals, but currently no analysis has been done on the variances between the other states where these festivals take place and Alaska's prices. Without doing this further analysis, price changes based on this are unwise.

- The average price for Greek Coffee was \$2.55. The Alaska festival charged \$3.00.
- The average price for Baklava (single piece) was \$2.79. The Alaska Greek Festival charged \$3.00.
- The average price for Gyro was \$7.38. The Alaska Greek Festival charged \$8.00.
- The average price for Moussaka was \$10.05. The Alaska Greek Festival charged \$22.00.
- The average price for Pastitsio was \$9.77. The Alaska Greek Festival charged \$22.00.

Overall, Alaska prices tend to be higher than the averages found in the cross comparison spreadsheet.

It is worth noting again that the Moussaka and Pastitsio numbers are not directly comparable. As an example of why, there is one festival that only charges \$4.00 for a Moussaka. This price most likely means that it is served a la carte. Because this is not defined by the festival website and was not anticipated as a possible reason to toss out the data when drafting the research plan, it was included in the cross-comparison spreadsheet. The Alaska Greek Festival currently sells Moussaka as a dinner package rather than a la carte; thus these two are not comparable and are different products.

Ticket Price for Admission to Festival

Ticket prices varied wildly from festival to festival, if there is a stated price. As can be seen in the exhibit below, the price for admission range from \$1.00 to \$14.00. The \$14.00 price does include a dinner ticket that is redeemed at the festival.

	\$ 1.00	\$ 2.00	\$ 3.00	\$ 4.00	\$ 5.00	\$ 6.00	\$ 7.00	\$ 14.00
Count of Ticket price	7	11	26	2	15	3	1	1

Exhibit 10: Cost of admission

What was noted but not calculated was that many festivals the admission prices is a suggested donation, or there were free days/ times, discounts for students, or coupons for free or discount admission.

Many festival websites were lacking any data on cost for entry. Below is a graph that shows the number of festivals that have an admission price, have free admission or lack data.



Exhibit 11: Cost Vs. Free admission to Greek festivals

Goals and Objectives of Greek Festivals

One of the main requirements for the Lean Six Sigma Define section of the DMAIC process is defining the goals and objectives for the festival. This was added to see what, if any, goals and objectives were stated on the Greek Festival websites. Descriptive analysis of stated goals of festival gives three themes to these goals:

- Support local/ national charities
- Support the church and its ministries
- Support Hellenic culture

These are in line with the stated goals and objectives for the Alaska Greek Festival, to support the building of the new church and to give the community a chance to experience Hellenic culture.

Other Relevant Information

The final item that was on the cross comparison spreadsheet was another box that could take any other relevant or interesting information. Descriptive analysis of ideas other Greek Festival are doing at their events. This was gathered to provide the festival organizers with ideas for things that they could do in the future, ways to grow, or to see what other Greek Festivals think is important information to disseminate on their website.

Descriptive analyses discovered many themes that run through the festivals. The interesting information was categorized by theme, and some festivals had several, some only had one or two. They are as follows:

Themes	Count
Kid activities	23
Food: Frozen/ pre-order/ Drive thru/ Take out	22
Tokens for cash	10
Hellenic culture	10
Dance related activates	9
Credit cards accepted	9
Raffle for trip to Greece for 2	7
Fun run	3
App for festival	3
Loukoumades eating contest	2

Exhibit 12: Descriptive themes of Greek festival activities

The theme that is most relevant to talk about here is the raffle for a trip for two to Greece. The Alaska Greek Festival used to have a similar raffle item, but was dropped due to the complicated way it was organized. The Alaska Greek Festival organizers would raffle off a trip, and then negotiate with both the winner and the party donating the trip and accommodations. The festivals who still host the raffle offer it as a travel voucher that is redeemable by a travel company for a set price.

The festival organizers could consider reestablishing this raffle item, and simplify the earlier process by just raffling off the voucher rather the more complicated process.

This is why this section was included in the research; to allow the festival organizers to see possibilities that they may have overlooked or previously had tried by were removed from the festival.

The cross comparison spreadsheet gave an overview, based on the websites of 158 other Greek Festivals in the United States and Canada, of what their festivals have to offer their guests. This includes where the festivals are located, the length of the festival, age of the festival, and average food prices of the festival. It also has descriptive analysis of goals and objectives and other relevant information about their festival. This information will give the festival organizers to see how other festivals run their events.

The biggest discovery from this research is the lack of scholarly research in the field of event management for ethnic festivals. It is a field with very little information, and most of it is focused on issues facing the diaspora or multiculturalism rather than event planning, process analysis or the methods of data collection for resource efficiencies.

Most research on resource efficiencies is focused on hospital or medical care, or businesses. Deeper analysis and study of ethnic festivals, and Greek Festivals in particular, is necessary to learn how these festivals can continue on for decades running on volunteers and limited formal processes, and a limited amount to data collection.

Final Deliverable

The final deliverable for this project was the Alaska Greek Event Management Plan. The plan contains structure from both project management and event management that is tailored to fit the current needs of the Alaska Greek Festival. The complete event management plan is located in the appendix.

The biggest piece that was missing from all of the previous festivals was a Charter. The event plan used a Project Management template for the start of the Charter and filled in bits and pieces as needed. The charter defines the goal, objectives, Key Performance Indicators, and sets up strategic planning for the festival to occur in the initiation phase of the festival planning.

The strategic planning will include the review, updating and accepting of the Charter, a Gap Analysis for the festival, and a SWOT Analysis. As discovered in the empirical research, strategic planning is the missing piece in festival planning. These tools will be used to help guide the planning process of the festival by establishing the foundation of the festival structure to thrive.

Other important items that were included in the event management plan is the master procurement guide. It takes all of the recipes that will be made, and calculates the total needed materials. It also included information as to costs of ingredients to calculate the cost per serving of each item, minus the cost of labor. This allow a side by side analysis of the costs and profits of the individual food items sold at the festival.

This will help simplify the procurement process in the future by having one spreadsheet for ordering rather than piece meal ordering.

Since the Alaska Greek Festival is able to receive a number of these items as donations or at reduced cost, this will also make the donation request process faster, since there will be no need to submit revised request or running out to buy items that were missed, at a higher price.

Officially complete 4/1/2016 and delivered to Project Sponsor, the Festival Chairperson.

Key Project Achievements

Key project achievement of this project was the completion of the event management plan. The festival organizers now have a mutable document that will create strong structure with strategic planning and Lean Six Sigma tools and techniques to help guide the Alaska Greek Festival to many future years for growth.

This event plan will reduce the amount of stress that was previously involved in hosting the event. It will also establish the use of tools and techniques to seek resource efficiencies. Weaving strategic planning and efficiency seeking processes into event management plan will set the festival organizers on a path for success.

Summary and Conclusions

The impact of project will be in creating structure for the festival organizer for the Alaska Greek Festival. This structure will make the planning process less stressful and weave strategic planning and resource efficiency within the fabric of the event plan. This will allow for managed growth of the festival, and seek to create more value for their guest and eliminate waste with Lean Six Sigma processes.

Also, empirical knowledge of large scale Greek Festivals is hard to find. It's not a subject that has been studied in detail, but there is a rich vein of knowledge that can be discovered.

Recommendations for Further Research

The lack of empirical research in event management of Greek Festivals is an excellent place to recommend for further research. Further developing the Greek Festival cross comparison spreadsheet, with additional information for revenue and costs involved in hosting the event, along with additional information about how the festival is managed would be very promising.

Other recommendations for further research would be to focus a research project on the use of Lean Six Sigma tools and techniques in the management of festivals and other large events. This seems like a natural extension of the non-profit fundraising management needs to keep costs down, while increasing customer value, and thus money funds raised, but the journal articles tended to focus on the use of Lean Six Sigma tools being used on the business side of non-profit management rather than the development side.

The final recommendation would be to do economic impact of the ethnic festivals and specifically Greek festivals.

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Appendices

Alaska Greek Festival Event Management Guide

Template Reference list

Letter of Support

Project Charter with Final PM Plan

Work Log Narrative

Key Project Management Knowledge Areas

Closeout Check List

Lessons Learned

Cross Comparison Spreadsheet Raw Data

Final Presentation PM 686A/B

HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

GREEK FESTIVAL



...BRING THE FAMILY AND ENJOY A TASTE OF GREECE...
GREEK FOOD • PASTRIES • MUSIC • DANCING!

LIVE GREEK MUSIC • KAFENIO (CAFÉ) • AGORA (BOUTIQUE)
TAVERNA (BAR) • RAFFLE • SILENT AUCTION • CHURCH TOURS
GREEK DANCING – FOLK & MODERN • COOKING DEMOS

Event Managment Plan

Alaska Greek Festival Event Management Plan Table of Contents

Initiation

- i. Charter
 - 1. Strategic Planning Guide
 - 2. Meeting Agenda/Minutes Template

Planning

- ii. Schedule/ Time Management Plan
 - 1. Gantt Chart
 - 2. Kitchen Schedule
 - 3. Work Break Down Structure by Month
- iii. Financial Management Plan
 - 1. Expenditures/ Revenue previous years
 - 2. Accounting Best Practices
 - 3. Cost Management
- iv. Risk Management Plan
 - 1. Health and Safety Plan
 - 2. Event Risk Assessment
 - 3. Incident Process and form
- v. Stakeholder Management Plan
 - 1. Stakeholder Analysis and Registry
- vi. Communication Plan
 - 1. Marketing Worksheet
- vii. HR Management Plan
 - 1. Volunteer Handbook and Waiver
 - 2. Volunteer Sign-up Templates

Implementation

- viii. Procurement Plan
 - 1. Master Order and Costing Spreadsheet
 - 2. Event Permit Description Template
 - 3. Donation Request Letter Template
- ix. Quality Management Plan
 - 1. Metrics and Data Spreadsheet Template
- x. Change Management Plan
 - 1. Change Requests Form

Event

- xi. Festival Set Up Plan
 - 1. Festival Site Layouts
- xii. Festival Clean Up Procedures
 - 1. Inventory Template

Closure

- xiii. Close Out Plan
 - 1. Close Out Report Template
 - 2. Donor Thank You Letter Template

Holy Transfiguration Greek Orthodox Church

Event Charter

Alaska Greek Festival

Executive Summary

Overview/ History

The Greek Orthodox Church in Anchorage, Alaska, created the annual Greek Festival in August of 1995. The purpose of organizing that event was to raise enough money for the yearly operations of the church, and to eventually build a traditional, Byzantine styled church building.

The festival has been hosted for 20 years; each year getting bigger and better. The festival creates both revenue to build the church and a change for the Anchorage community to experience authentic Greek cuisine and culture.

The Alaska Greek festival is held on the grounds of the Holy Transfiguration Greek Orthodox church at 2800 O'Malley Road, Anchorage, AK 99507

Strategic Planning

Strategic Planning

Strategic planning is used to define the festival strategy and to assure the proper allocations of limited resources. This involves redefining goals to assure they are in alignment with the festivals mission, the efficient allocation of limited resources and analysis of current festival programs for efficiency and strengthen operations.

Strategic planning must take place before festival planning can begin. This should be done during the festival Subcommittee Kick-off meeting. It will create a clear path towards the successful implementation of festival resources.

Gap Analysis

A Gap analysis will be performed to assess the difference between actual performance and desired performance. Gap analysis identifies the gaps between where the festival is and where it should or could be.

SWOT Analysis

SWOT, Strengths Weaknesses, Opportunities and Threat Analysis is a study of the festivals internal strengths and weaknesses and external opportunities and threats. SWOT analysis is used to identify positive and negative factors that promote or inhibit the successful implementation of the festival.

Project Definition

Mission

Host Annual Alaska Greek festival at the Holy Transfiguration Greek Orthodox church to raise funds for the church and to exhibit Greek culture and cuisine to the local community, while implementing the most efficient use of limited resources to raise funds for the building of the new church.

Objectives and Goals

Objective 1: Make money for building new church

Objective 2: Community experience authentic Greek culture and cuisine

SMART Goals

- Fundraising-
 - Raise \$xxxK for church building fund
 - 10% increase in revenue from last year
 - Reduced expenses by 25%
- Experience-
 - Have 200 visitors take church tour to learn about the faith
 - Sell 10,000 individual Greek pastries

Scope

Host a three day Greek Festival at the Holy Transfiguration Greek Orthodox church.

Event Management Phase Schedule Timeline

January	February	March	April	May	June	July	August	September
Initiation								
Planning								
	Implementation							
							Event	
							Closure	

Milestones

Key Milestones	Completion Date	Critical Dependencies
Permits Issued		
Procurement Complete		
Baking Complete		
Donations Inventoried		

Budget Estimate

Rough Order of Magnitude Estimate

Preliminary Budget ROM +/- 20%	Capital Items:
	Expense Items:
	Labor Costs:
	Total estimated costs to complete this project:

Quality Assurance

Quality Assurance methods will be defined to ensure festival products and services are provide authentic Greek cuisine and to ensure a satisfactory experience of visitors.

These will be defined in the Quality Management Plan.

Metrics

Key Performance Indicators (KPI's) are metrics that are used to evaluate factors that are critical to the success of an event. KPI's are used to assess how the festival is operating at any given time. KPI's measure goals and objectives for the festival.

20 sponsors/ donators

500 people attended per day

Wait time in lines reduced to 5 minutes on average

The fist KPI will be used in implementation, the second and third will be used during the festival. Tracking will be defined in the Greek Festival Event Management Plan.

Critical Success Factors

Critical Success Factors are clearly defined elements that are vital to success of the festival.

Festival brings in \$xxxK in revenue

Festival has at least 500 visitors

No more than \$1 spent per \$3 raised

Project Priority Matrix

Project Propriety matrix clarifies what part of the festival is constrained, what is to be optimized and what can be changed.

For the festival, the time cannot be changed. It is constrained. The scope can be altered, to best suit the needs of the festival and cost can be amended to optimize or enhance the festival.

	Accept	Constrain	Enhance
Scope	X		
Cost		X	
Time			X

Assumptions

An assumption is a necessary factor that is defined as “will happen” in order to start planning the festival.

Festival will have similar program as previous years

Volunteers will be available to support event

Sponsor and donors will continue to give at similar levels of support

Constraints

A constraint is a factor that is defined as limited to start planning the festival.

Space for festival is constrained

Location is church grounds

Budget is limited

Risk Assessment

Major Overall Risks

A risk management plan will be create to assess risks that could affect the operation or experience of the event.

Risk Event	Probability	Impact	Risk Strategy
Location Hazard			Location Assessment
Health and Safety			H&S Officer

Stakeholder Management

Involvement of stakeholders is critical to the success of the Greek Festival. Stakeholders will be managed by a Stakeholder Management Plan. These stakeholders include, but are not limited to the following;

Parish

Hillside Community

Greek Community

Anchorage Community

HR Requirements

Roles and Responsibility

Event Sponsor

The Event Sponsor is the champion of the event and has authorized the event by signing the event charter. This person is responsible for the funding of the event and is ultimately responsible for its success. Since the Event Sponsor is at the executive level communications should be presented in summary format unless the Event Sponsor requests more detailed communications.

Chairperson

The Chairperson has overall responsibility for the execution of the festival as defined in the Alaska Greek Festival Best Practices Guide. As the person responsible for the execution of the event, the Chairperson is the primary communicator for the event, distributing information according to the Communications Management Plan.

Subcommittee Members

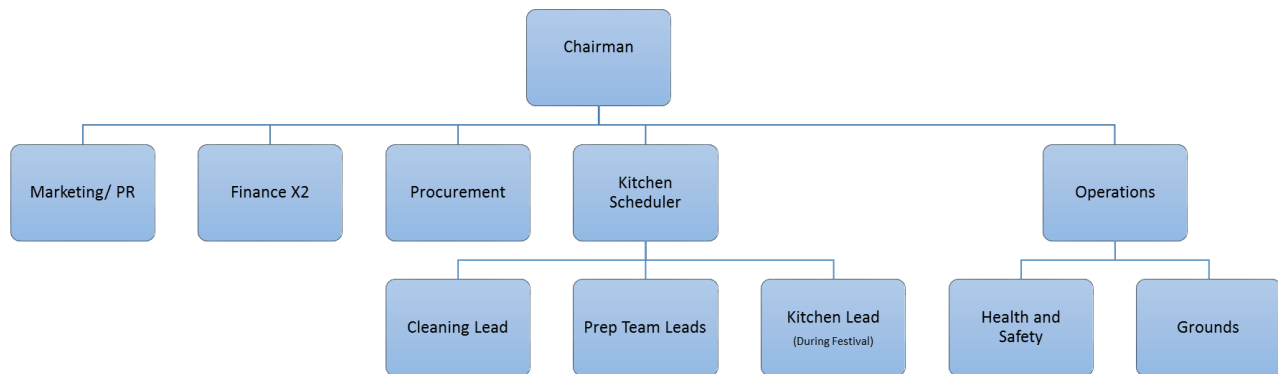
The Subcommittee provides strategic oversight. The purpose of the Subcommittee is to ensure the execution of the festival meets the stated goals of the festival charter. Subcommittee is made up of booth leads and other who are defined on the organizational chart as having authority and control over a section, or sections of the festival.

Volunteers (Prep, Grounds Crew, Event Team, Etc.)

Volunteers are all persons who have a role performing work on the event. They need to have a clear understanding of the work to be completed and the framework in which the event is to be executed. This requires a detailed level of communications, which is achieved through interactions with the Operations Manager, Subcommittee Members and other team members.

Organization Chart

Organization Chart will be used to define roles and responsibilities of volunteers.



Approvals

Agreement Approval Form

Alaska Greek Festival 2016

I have reviewed the information contained in the Project Charter, and agree to the baseline commitments specified in it.

Chairperson: _____ Date: _____

Parish Council: _____ Date: _____

Strategic Planning Guide

1. Assess
 - a. Gap Analysis
 - i. Link practices to best practices
 - b. Environmental Scan/ Big picture view
 - i. Internal and external obstacles define
 1. Include stakeholders in assessment process
2. Create
 - a. Define proposition/ challenges/ what's not working
 - b. Define strategies and tactics for corrective action
3. Execute
 - a. Do it
 - b. Measure changes
4. Sustain
 - a. If it works, keep doing it
 - b. If not, start over

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Assess

Tools: Gap Analysis and SWOT (Strengths, Weakness, Opportunities, Threats)

Gap Analysis

[illegible]

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SWOT

Assess Strengths & Weaknesses	Within the context of the PROPOSITION, determine and record the organization's STRENGTHS and WEAKNESSES. STRENGTHS = Have WEAKNESSES = Don't Have		STRENGTHS		WEAKNESSES
				Experience	
				Knowledge	
				Competencies	
				Capabilities	
				Key Staff	
				Reliability	
				Trust	
				Quality	
				Reputation	
				Customer	
				Financial	
				Regulatory	
				Location	
				Other	
Assess Opportunities & Threats	Within the context of the PROPOSITION, determine and record the organization's OPPORTUNITIES and THREATS. These are circumstances external to the organization. OPPORTUNITIES = Advantages THREATS = Disadvantages		OPPORTUNITIES		THREATS
				Alliances	
				Partnerships	
				Product	
				Import	
				Export	
				Innovation	
				Technology	
				Competition	
				Currency	
				Customer	
				Financial	
				Regulatory	
				Geography	
				Other	

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Create

KEY ELEMENTS		
INTERNAL OBSTACLES		EXTERNAL OBSTACLES
STRATEGIES (The Pathway)		
STRATEGY #1		
TACTIC #	TACTIC	DUE DATE
1.1		
1.2		
1.3		
1.4		
STRATEGY #2		
TACTIC #	TACTIC	DUE DATE
2.1		
2.2		
2.3		
2.4		

Execute

STRATEGIC ROADMAP						
ID #	S / T	REVENUE TARGET	DESCRIPTION	OWNER	GOAL ALIGNMENT	DUE DATE
1	STRATEGY	<Revenue Target>	<Strategy #1 Description>	<Strategy Owner Name>	<Organization Goal Strategy Aligns To>	<Achieve By>
1.1						
1.2						
1.3						
1.4						
2	STRATEGY	<Revenue Target>	<Strategy #1 Description>	<Strategy Owner Name>	<Organization Goal Strategy Aligns To>	<Achieve By>
2.1						
2.2						
2.3						
2.4						

Terminology

Term	Usage Within This Template
Goals	The organization's stated goals, also known as "objectives"
Mission	The purpose of the organization or its reason for existing
Opportunities	External advantages that the organization can exploit
Proposition	Identification of the challenge/topic/situation to be resolved
Strategic Plan	Roadmap that accounts for the organization's identity, identifies future direction and enables goal alignment across the organization
Strategic Planning	Process by which a strategic plan is developed
Strengths	Components that the organization possesses or has
Threats	External disadvantages that could impact the organization's efforts/success
Weaknesses	Components that the organization does not possess or have

Kickoff Meeting Agenda

Project: Alaska Greek Festival

Date: x/x/xx

1. Organizational Structure
 - a. Edit / Approve
2. Chairmen Position
 - a. Role and Responsibility
 - b. Appointment
3. Chair Positions
 - a. Roles and Responsibilities
 - b. Appointments
4. Future Meeting Time/ Dates
5. Questions?
6. Next Steps
 - a. Project Charter
 - i. Goals and Objectives
 - ii. Critical Success Factors
 - iii. Scope/ Date/ Time
 - b. Project Overview
 - i. Strategic Analysis
 1. Gap Analysis
 2. SWOT Analysis
 3. Environmental Scan
 - ii. Project Schedule
 1. Work Breakdown Structure
 - a. Milestones/ Deadlines
 2. Timeline
 3. Calendar Finalized
 - c. Event Plan
 - i. How much involvement is too much involvement?
 1. Draft? Review? Updates? Create? Additions? Deletions?
 - a. Communication Plan
 - b. Marketing Plan
 - c. Stakeholder Management
 - d. Risk Management Plan

SCHEDULE MANAGEMENT PLAN

Schedule Management

Project schedules will be created using the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages.

Once a preliminary schedule has been developed, it will be reviewed by the Subcommittee and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved, the project sponsor will review and approve the schedule and it will then be baselined.

Roles and responsibilities for schedule development are as follows:

The Chairperson will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the Subcommittee.

The Subcommittee is responsible for participating in work package definition, sequencing, and duration and resource estimating. The Subcommittee will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The Event Sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is baselined.

The Event Stakeholders will participate in reviews of the proposed schedule and assist in its validation.

SCHEDULE CONTROL

The project schedule will be reviewed and updated as necessary with actual start, actual finish, and completion percentages which will be provided by task owners.

The Chairperson is responsible for schedule updates/reviews; determining impacts of schedule variances; submitting schedule change requests; and reporting schedule status in accordance with the event's communications plan.

KITCHEN SCHEDULE

A kitchen schedule will be created and maintained through the duration of the planning process for the event. It is critical that the kitchen prep work be done in a deliberative manor so that all of the available time for food prep is used to create the products for the event.

A Kitchen Schedule will be maintained to assure that the food products are being created in a timely way to allow for the creation of all of the food products.

FESTIVAL PLANNING TIMELINE

A Festival Planning timeline will be used to assist in the planning of the event. It is a high level overview of the major critical tasks and event phases.

Alaska Greek Festival Event Management Timeline							
Event	March	April	May	June	July	August	Sept
Initiation	Initiation						
Kick off meeting							
Planning	Planning						
Finalize budget							
Set timeline/ WBS							
Select Band							
Set menu							
Define layout/ booth							
Create marketing plan							
Create risk management plan							
Implementation	Implementation						
Muni/ Legal/ Insurance							
Contact sponsors/ donors							
Volunteers							
Procurement							
Marketing plan							
Site prep							
Food Prep							
Booth Prep							
Event						Event	
Operate festival							
Closeout						Closure	
Clean up/ Take down festival							
Finance Complete							
Document close out							
All work complete							

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names	February	March	April	May	June	July	August	September	October	November
1																
2	2016 Greek Festival	136 days	Fri 3/4/16	Fri 9/9/16												
3	Initiation	1 day	Fri 3/4/16	Fri 3/4/16												
4	Kick-off meeting	1 day	Fri 3/4/16	Fri 3/4/16												
5	Planning	136 days	Fri 3/4/16	Fri 9/9/16												
6	Finalize budget	4 days	Fri 3/4/16	Wed 3/9/16												
7	Set timeline/ WBS	1 day	Thu 3/10/16	Thu 3/10/16	6											
9	Select band	13 days	Thu 3/10/16	Mon 3/28/16	6											
14	Set menu	5 days	Thu 3/10/16	Wed 3/16/16	6											
20	Define festival layout	127 days	Thu 3/17/16	Fri 9/9/16	14											
31	Create marketing plan	12 days	Thu 3/10/16	Fri 3/25/16	6											
34	Create risk management plan	7 days	Thu 3/10/16	Fri 3/18/16	6											
38	Implementation	120 days	Mon 3/7/16	Fri 8/19/16												
39	Muni/legal	20 days	Mon 3/7/16	Fri 4/1/16	3											
46	Contact sponsors/ donors	15 days	Thu 3/10/16	Wed 3/30/16	6											
57	Volunteers	11 days	Thu 3/31/16	Thu 4/14/16	46											
70	Procurement	27 days	Thu 3/31/16	Fri 5/6/16	46											
82	Marketing plan	17 days	Mon 3/28/16	Tue 4/19/16	31											
89	Site Prep	20 days	Wed 7/20/16	Tue 8/16/16	197SS-4											
144	Food prep	99 days	Thu 3/31/16	Tue 8/16/16	46											
169	Booth Prep	5 days	Mon 8/15/16	Fri 8/19/16	197FS-1											
197	Event 8/19/16-8/21/16	3 days	Wed 8/17/16	Fri 8/19/16	164											
210	Closure	10 days	Mon 8/22/16	Fri 9/2/16	197											

2016 Alaska Greek Festival Kitchen Schedule

Item	Lead	March				April					May				June				July					August			
		5&6	12&13	19&20	26&27	2&3	9&10	16&17	23&24	30&1	7&8	14&15	21&22	28&29	4&5	11&12	18&19	25&26	2&3	9&10	16&17	23&24	30&31	6&7	13&14	20&21	27&28
Pastries: Melomakerona					Kitchen Cleaning					Greek Easter																	
Pastries- Galaktobouriko																											
Pastries- Kouluorakia																											
Pastries- Kourambietes																											
Pastries- Baklava																											
Pastries- Syrup																											
Pastries- Paximadakia																											
Pastries- Other?																											
Pastries- Coconut/ walnut cakes																											
Dinners- Moussaka																											
Dinners- Pastisio																											
Dinners- Spanakopita/ Tri	Pam																										
Dinners- Souvlaki (chicken/ pork cutting)																											
Dinners- Dolmadas																											
Dinners- Spanikopita/ Triopita																											
Dinners-Green Bean Sauce																											
Dinners- Youvetsi Sause																											
Dinners- Tzatziki																											
Dinners- Salad Dressing																											
																								Festival Weekend			
																								Clean-Up			

Work Breakdown Structure by Month

February

Kick-off meeting

- Appoint Chairperson
- Appoint committee members
- Set clear expectations and plan
- Define Org Chart
- Accept Org Chart
- Define roles and responsibilities
- Accept R&R
- Set up future meeting schedule
- Strategic planning
- SWOT
- Environmental Assessment
- Update mission statement
- Set SMART goals

Charter/ Create event management plan

- Set date
- Set plan
- Confirm goals, mission statement and vision
- Define schedule
- Define risk and mitigation
- Define budget
- Define business plan
- Identify sponsors/ partners/ supporters
- Define program
- Set timeline/ WBS
 - Define critical path/ milestones/ deadlines/ review periods

March

Set menu

- Review last year menu
- Analysis
- Define options for change
- Review business case for change
- Make decision

Define materials needed

- Signage
 - Check storage for signs
 - Review for updates
 - Decide if need to order more/ replacement signs/ new signs
 - Review options
 - Get quote

Food Goods

- Check storage
- Review for changes to menu
- Review options for procurement
- Get quote

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- Ask for donations
- Paper goods
 - Check storage
 - Review for updates
 - Decide if need to order more/ replacement / new
 - Review options for procurement
 - Get quote
 - Ask for donations
 - Donations
 - Check storage
 - Review for updates
 - Decide if need to order more/ replacement / new
 - Ask for donations
- Tents/ table/ chairs/ other rental items
 - Check storage
 - Review for updates
 - Decide if need to order more/ replacement / new
 - Review options for procurement
 - Get quote
 - Sound equipment
 - Review options for procurement
 - Get quote
- Stage and lighting
 - Check storage
 - Review for updates
 - Decide if need to order more/ replacement / new
 - Review options for procurement
 - Get quote
- Restrooms
 - Review options for procurement
 - Get quote
- ATM
- Other
- Select band
 - Review options
 - Send out requests for time/ cost
 - Review responses
 - Make decision
- Define festival layout
 - Review pervious layouts
 - Analysis potential changes
 - Define bottlenecks
 - Define options for change
- Set layout
 - Make digital layout map for committee
 - Define booth space
 - Review pervious year needs
 - Update space requirements

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- Add to digital layout map
- Define electrical/ power needs
 - Review history
 - Define changes/ upgrades
 - Talk to electrician
 - Set plan
- Finalize budget
 - Confirm money handling procedures
 - Confirm reimbursement procedures
 - Confirm contract processes
- Research sponsors/ donors
 - Review previous years donor list
 - Draft letter of request- with specific requests?
 - Research new donors/ sponsors
- Create marketing plan
 - Update marketing plan template
 - Follow marketing plan
- Create risk management plan
 - Update risk registry template
 - Walk around to check for hazards
 - Complete risk analysis and mitigation planning

April

- Muni/legal
 - Permits
 - Police/ Traffic control
 - Liquor permit
 - Insurance
 - Other Legal documents needed
 - Food Handler cards (DHS)
- Contact sponsors/ donors
 - Send out request for needed supplies
 - Coordinate pick up/ drop off
 - Track all donations
 - Search for holes
 - Send out second target request to fill in holes
 - Coordinate pick up/ drop off
 - Buy missing but needed materials
- Contact rental companies- Table/ Chairs/ Sound equip/ stage/ lighting/ etc.
 - Cross check prices for best deal
 - Set time for set up/ take down
 - Sign contract
 - Confirm arrival/ take down
 - Confirm set up lay out
- Procurement
 - Coordinate with chairs to define needs
 - Coordinate with subcommittee to define amounts/ budget
 - Order items

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Stored items in Connex

Inventory and label items for easy access

May

Volunteers

Send out general request for volunteers and donations

Set clear standard of who is needed, when they are needed, what is expected and a timeframe for when they are needed

Create volunteer sign-up sheet

Keep track of holes/ fill as needed

Set up volunteer training/ expectations/ time to sign waiver

Set up time before each volunteer event

Go over Best Practices

Get signed waiver

Go over expectations

Define schedule/ organize volunteers for both prep and festival

Clearly communicate schedule and org to volunteers

Call volunteers to confirm availability and preferences for what they'd like to help with

Food prep

June

Marketing plan

Do what was planned

Research free or low cost options

Update Facebook/ email out updates

Update brochure/ flyers/ other marketing items

Put out flyers/ send out brochures

Update website

Inform neighbors/ O'Malley road users of festival/ traffic delays

July

Site Prep

Ground work

West Parking lot

Power wash

Set up car ports

Set up table/ shelves/ etc.

Other

East Parking Lot

Weed whack

Power wash?

Clear garbage

Stow al items

Set up car ports against church

North lot

Power wash

Weed whack/ mow

Gravel Pad on south side

Weed whack / mow?

Back deck

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- Power wash
- Clean off and stow all items
- Wash and sanitize chest freezer
- Walk-in cooler/ freezer
 - Empty everything out of cooler
 - Powerwash/ Sanitize walk-in
 - Wash shelves
- Call K Refrigeration to start up cooler
- Set up for product storage
- Kitchen/ Pastry room
 - Clean and sanitize ovens/ light covers/ hood vent/ spice rack/ ss table/ windows/ baseboards/ stove top/ other
 - Scrub floors
 - Organize supplies
- Prep room
 - Clean and sanitize cooler/ freezer/ shelving/ tables/ buckets
 - Scrub floors
 - Other
- Wash garbage cans
- Mow lawn
- Check fire extinguishers / Get certified/ refilled
- Inventory extension cords
- Call to pump septic
- Power wash racks/ mats/ chairs

August

- Parking
 - Coordinate with Middle School?
 - Set up shuttle
 - Coordinate with Abbott o Rabbit parking people
 - Chalk/paint out spaces
 - Set up flags/ barricades
 - Sign handicap spaces
 - Hire parking guys?
 - Confirm lay out
- Electrical
 - Set up electrical
 - Test
 - Inform booth volunteers of process for additional power needs
- EVENT- Booth Prep
- Dinner booth
 - Clean and sanitize warmers/ coke coolers/ other
 - Check wiring
 - Confirm pan count
 - Confirm booth equipment
- Souvlaki/ Gyro booth
 - Wash and sanitize keg cooler/ double door coolers/ other
 - Confirm charcoal
 - Clean grills

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- Confirm Propane
- Confirm meat prep schedule/ prep schedule
- Hot dog/ Drink booth
 - Reserve Coke truck?
 - Confirm delivery
 - Confirm hot plates/ pots for water/ warmers and chaffers for dogs/ condiments/ ice/ water source/
 - Plug in and check equipment
- Agora/ Deli
 - Move cooler/ chest freezer to agora
 - Confirm electrical
- Loukoumades
 - Clean and sanitize fryer
 - Confirm supplies
- Main Stage/ Tables
 - Vender set up
 - Decorations
 - Parthenon/ tent poles
- Lighting set up
- Money/ Cash Drops
 - ATM
 - Registers
 - Booths
- Set up booths with goods
- Get money box/ cash
- Sell/ Track usage or metrics
- Submit funds
- Clean/ sanitize as needed
- Band
 - Set up sound equipment
 - Sound check
 - Play
 - Take break/ eat
 - Play
 - Etc.
- Dance Group
 - Confirm dance costumes available
 - Clean dance costumes
 - Confirm dancers schedule
 - Dancers change
 - Dancers practice
 - Dance
 - Break
 - Etc.
- Church tours
 - Define schedule
 - Father Vasilios give tour
 - Answer questions

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- Break
- Give tour
- Etc.
- Cooking Demo
 - Define demo/ schedule
 - Get materials
 - Confirm/ get materials
 - Demo
 - Break
 - Etc.
- Silent Auction
 - Review donations
 - Set up auction
 - Create auction forms
 - Close auction
 - Take funds for items
 - Call people who didn't pick up items at festival
 - Collect funds
 - Close out auction
 - Put away uncollected items for next year
 - Submit funds/ receipts
- Photo / Bounce House
 - Set up
 - Get money box/ cash
 - Sell/ Track usage or metrics
 - Submit funds
- Parking/ Shuttle/ Traffic control
 - Traffic control
 - Make sure police are there
 - Parking
 - Manage flow of cars/ pedestrians
 - Track numbers
 - Shuttle
 - Trips from church to other lot
 - Track numbers
- Sanitation
 - Set up hand washing stations
 - Check on stations
 - Remove trash/ sanitize
 - Tables
 - Trash Bins
 - Booth Trash
- Raffle Booth/ Car Raffle/ First Aid/ Lost Child/ Questions?
 - Set up
 - Sell
 - Track metrics
 - Sell
 - Etc.

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Metrics

- Set up metrics system
- Collect data
- Save data as defined

Clean up

- Trash removal
- All leftover food put away, or given away
- Take down church owned tents
- Storage items stored
- Put away equipment
- Dishes
- Wash/ Put away

September

Lessons learned

- Capture lessons learned
- Add to documentation

Risk Registry

- Update risk registry

Procurement

- Final payments
- Final contracts
- Audit payments/ invoices

Metrics

- Data analysis
- Create presentation
- Send out to parish

Suggestions for improved data taking for next year

Finances

- Final count of funds
- Contracts completed/ audit invoices
- Send out final numbers

ARCHIVE- Confirm documentation complete and in drop box

Financial Management Plan

Purpose

The policy and procedural guidelines contained in this handbook are designed to:

- protect assets;
- ensure the maintenance of accurate records of the Greek festival's financial activities;
- provide a framework of operating standards and behavioral expectations; and,
- ensure compliance with federal, state, and local legal and reporting requirements

Exceptions to written policies may only be made with the prior approval of the Subcommittee. Changes or amendments to these policies may be approved by the Subcommittee at any time. A complete review of the policies shall be conducted every two years by the Subcommittee or other designee.

All personnel with financial responsibilities are expected to be familiar with and operate within the parameters of these policies and guidelines.

Roles

Chairperson

The Chairperson has the responsibility for administering these policies and ensuring compliance with procedures that have been approved by the Subcommittee. The Chairperson has whatever authority as may be designated by the Subcommittee, including:

- making spending decisions within the parameters of the approved budget
- employing and terminating personnel
- determining wage levels
- creating and amending operating procedures and controls
- making decisions regarding the duties and accountabilities of personnel and the delegation of decision-making authority
- entering into contractual agreements within board designated parameters

Policies and procedures which are not specifically addressed by this document may be determined by the Chairperson when the financial impact is not over \$1000 for any fiscal year. The Subcommittee must approve any unaddressed policy or procedure with an impact of over \$1000.

General accounting policies

The accounting system follows general accepted accounting policies (GAAP). Financial statements are prepared using the accrual (*or cash*) basis of accounting. The fiscal year is July 1 through June 30.

Administration

Financial duties and responsibilities are separated so that no one employee has sole control over cash receipts, disbursements, payroll, reconciliation of bank accounts, or any critical accounting function.

The Finance Chair has primary responsibility for designing and maintaining the accounting system. Bookkeeping support may be provided by other staff as designated.

The accounting records are updated regularly and subject to the oversight of the Chairperson or they're designate on at least a monthly basis.

A filing system accessible to the Chairperson is maintained for all financial records. This filing system may be electronic or paper, or both.

Professional financial service providers are reviewed annually.

Budgets

The annual budget for the fiscal year is prepared by the Finance Committee or Chairperson working closely with the appropriate staff.

The Subcommittee approves the budget annually, prior to the beginning of the fiscal year if possible.

The budget is compared to the monthly financial statements in order to monitor the actual results.

The budget is reviewed mid-year and adjusted as necessary to reflect changing conditions. The Subcommittee approves proposed changes in the budget which exceed \$1000.00 or 50% of the line item, whichever is greater.

Financial Statements

Monthly financial statements are completed and presented to the Finance Committee within 30 days of the close of the period.

A financial overview and Profit & Loss Statement through the end of the previous month are provided to the Subcommittee at each meeting.

Audit

An annual audit is conducted by an Audit Committee of 3 people after the close of each fiscal year. The audit covers the fiscal year of July 1st through June 30th.

The Treasurer, the Chairperson and the Accountant are involved in the annual audit/review. Presentation to the Board of the audit is done by the auditing firm with assistance from the Treasurer and accountant.

Banking

General

The Chairperson chooses a financial institution which provides the most appropriate services for the lowest cost. The location of the financial institution is taken into account.

Separate bank accounts are maintained for operating expenses, payroll expenses, and savings.

The operating account maintains sufficient funds to meet all anticipated expenditures. Generally, a balance between \$5,000 and \$50,000 is sufficient.

The savings account is used to replenish the operating account when necessary and to receive excess funds from the operating account when available.

Deposits

Whenever possible, persons receiving funds are other than the person tabulating and preparing the deposits. Also, the person tabulating and preparing the deposits should be other than the person recording the deposits.

In general, deposits are made nightly.

All funds are deposited in an assigned financial institution, with the exception of petty cash (see Petty Cash). The deposit receipt is attached to the Deposit Record.

All checks and cash received are recorded on a daily log, listing the date received, payer, purpose, and amount received. All checks are stamped “for Deposit only” immediately upon receipt.

All funds received are sent daily with the daily log to the accounting department for processing. Total funds are compared to daily log totals to ensure an accurate total of cash received. A receipt is provided by the accounting department for all funds received, with receipt copies attached to the daily log. All funds are placed in a locked box until preparing the deposit.

A Deposit Record is prepared listing the source account, source description, date received, amount received, and amount deposited for each line item, and a total of all funds received and deposited. *None of these funds is used to pay for expenses of any kind.* Notes are added for any discrepancies. Daily logs are attached to the Deposit Record. The Deposit Record is initialed by the preparer. A bank deposit slip is prepared and a copy attached to the Deposit Record.

After the deposit is made, the Deposit Record with attached daily logs, deposit slip, and deposit receipt is turned in to the accountant. All deposit papers are reviewed, confirmed, and recorded. Recorded deposits are marked “POSTED.”

Copies of all checks or vouchers for grants and contracts are placed in their source files.

Check Signing

The Board appoints the check signers. Usually these are the Treasurer, the Chairperson, and Parish Council. The check signer(s) must not be the person who writes checks or who does the bookkeeping.

Blank checks are never signed in advance.

A relevant invoice or back-up document accompanies each check for the check signers to review.

The check voucher is used to ensure a record of the check is maintained.

Sequentially numbered organizational checks are used to maintain a proper control over the checks. Voided checks are kept and clearly marked VOID. The signature area of voided checks is cut out and discarded to prevent misuse.

Disbursements

Whenever possible, separate persons are responsible for coding, preparing, and authorizing disbursements.

Invoices are paid in a timely manner, generally weekly, and before late penalty charges apply.

Attempts are made to issue checks for client assistance and employee advances as soon as practical, although advance notice of at least two business days is recommended.

Two check signers are required for checks greater than \$250.

No checks may be written to "cash" or "bearer."

All payments, except petty cash, are made by pre-numbered checks and are accompanied by substantiating documentation. Documentation may be an invoice (bill) or requisition form.

All invoices are marked with the date received and are directed to the accounting.

Invoices are reviewed to ensure that the goods were received or services rendered.

Each invoice is attached to a requisition form or marked with the NPO Payment Approval stamp. The proper account(s), funding source, and program are identified and coded for each invoice. The requisition form or marked invoice is approved by the appropriate manager and the Chairperson. If the Chairperson is not available, the ED's designate or the Board Treasurer may approve an invoice for payment.

After approval, invoices are passed to the accounting assistant for entering a bill into Accounts Payable. Entered bills are passed to the staff accountant for review and printing of checks. Printed checks are attached to the requisition forms and passed to the Chairperson for signing.

Signed checks are passed to the accounting assistant for mailing or distribution.

Once payment is made the requisition form is be filed with the check voucher in the monthly A/P folder. The check number is written on the requisition form or invoice.

Reimbursements

A requisition form is prepared and approved when requesting personal reimbursement for expenses. Relevant invoices and receipts are attached.

Mileage expenses are reimbursed at the federal rate in affect at the time of the expense.

Accounts Receivable

Invoices for grants receivable are sent out, either my email or mail, as soon as practical in accordance with the terms of the grant agreement or contract. A copy of each invoice is kept in the appropriate grant A/R file with a notation of the date it was sent. When payment is deposited, a copy of the check stub is attached to the invoice, which is then notated with the date paid and marked "POSTED."

Invoices for other accounts receivable are kept in a general A/R file. When payment is deposited, these invoices are marked "POSTED" and transferred to an A/R received file.

Account Reconciliations

Bank reconciliations are done monthly. Bank statements are reconciled by someone other than the check signer or writer.

Bank accounts are reconciled monthly against the account statement. Supporting documentation is either attached (as for Petty Cash) or the location is referenced (as for Grants Receivables files). Individual documentation, such as the number of a check or journal entry, may be referenced in the Details Column of the Reconciliation Statement.

Large Purchases

Purchases greater than \$100 are approved by the Chairperson.

Purchases greater than \$500 are approved by the Subcommittee.

Generally, NPO seeks three quotations for purchases greater than \$1000 where at least three suppliers are available for that service or product.

Conflict of Interest

Purchases of goods or services are not made from any employee or director of the organization. Members of the Subcommittee declare any conflict of interest with regard to financial terms.

Purchase of personal items for employees or directors is not made.

Capital Expenditures

Tangible assets exceeding \$1000 and expected to last longer than a year are classified as capital assets and included in an inventory record. The capital assets inventory record contains descriptions, serial numbers, dates of purchase or receipt, valuations, dates of valuation and item locations.

A depreciation schedule is prepared annually by the auditing firm.

Donations

Donated capital assets are recorded at fair market value if it can be reasonably estimated.

The nature and amount of the donated capital assets is disclosed.

The value of donated materials and services is recorded at a reasonable estimate.

Festival Specific Internal Financial Controls

Maintain a system of internal controls to provide stakeholder with reasonable assurance that the resource are being efficiently and in a way are being accounted for. These controls are to define how the festival will be:

- Properly handle funds
- Maintain inventory records
- Reduce exposure to risk

Sanctions for non-compliance: Anyone deliberately circumventing an internal control will be asked to switch to a position that does not require involvement in a process that requires the use of an internal financial control, or they may be asked to leave the festival entirely.

Internal financial controls include, but are not limited to the following:

Cash income

- Accumulated cash held in safe place and logged into spreadsheet
- Two people involved in cash handling at all times
- Cash reconciliation must be done by someone different
- Cash will be maintained in locked boxes/ safe when not in use or being counted
- Lockboxes counted at money drop times
- Deposit will be made the following business day

Cash registry / Point of Sales system

- Monitor sales
- Running tally of cash/ credit amounts
- Cross reference with actuals

Money drops

- Two persons at all times
- Collect funds at registers, compare with registers for compliance

Donations and Sponsorships

- Donations and sponsorships will be catalogued, and issued receipt
- Donators and sponsor will be properly acknowledged
- Names and contact information will be saved for future requests

Inventory

- All deliveries should be stocked and properly inventoried
- Master inventory list of all equipment will be reviewed and updated annually

COST MANAGEMENT PLAN

INTRODUCTION

The Finance officer will be responsible for managing and reporting on the project's cost throughout the duration of the project. The Finance officer is responsible for accounting for cost deviations and presenting the Chairperson with options for getting the project back on budget. The Chairperson has the authority to make changes to the project to bring it back within budget.

COST MANAGEMENT APPROACH

Earned Value calculations will measure and manage the financial performance of the project. Work started on work packages will grant that work package with 50% credit; whereas, the remaining 50% is credited upon completion of all work defined in that work package. Costs may be rounded to the nearest dollar and work hours rounded to the nearest whole hour.

MEASURING PROJECT COSTS

Performance of the project will be measured using Earned Value Management. The following four Earned Value metrics will be used to measure to projects cost performance:

- Cost Variance (CV)
- Cost Performance Index (CPI)

COST VARIANCE RESPONSE PROCESS

The Control Thresholds for this project is a CPI of less than 0.8 or greater than 1.2. If the project reaches one of these Control Thresholds, a Cost Variance Corrective Action Plan is required. The Financial officer will present the Chairperson with options for corrective actions within five business days from when the cost variance is first reported. Within three business days from when the Project Sponsor selects a corrective action option, the Project Manager will present the Project Sponsor with a formal Cost Variance Corrective Action Plan. The Cost Variance Corrective Action Plan will detail the actions necessary to bring the project back within budget and the means by which the effectiveness of the actions in the plan will be measured. Upon acceptance of the Cost Variance Corrective Action Plan it will become a part of the project plan and the project will be updated to reflect the corrective actions.

PROJECT BUDGET

The budget for this project is detailed below.

Material Costs	\$xxx,xxx.xx
Vendor Costs	<u>\$xxx,xxx.xx</u>
Total Project Cost	\$xxx,xxx.xx

RISK MANAGEMENT PLAN

The approach taken to manage risks for this project included a methodical process by which the subcommittee identified, scored, and ranked the various risks. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk manager has taken the necessary steps to implement the mitigation response at the appropriate time during the schedule.

Upon the completion of the festival, during the closing process, the Chairperson will analyze each risk as well as the risk management process. Based on this analysis, the Chairperson will identify any improvements that can be made to the risk management process for future festivals. These improvements will be captured as part of the lessons learned knowledge base.

RISK IDENTIFICATION

For this project, risk identification was conducted in the initial project risk assessment meeting. Risks will be identified by members of the subcommittee, and through analysis of previous festival notes, lessons learned and institutional knowledge of the subcommittee members.

In order to determine the severity of the risks identified, a probability and impact factor was assigned to each risk. This process allowed the project manager to prioritize risks based upon the effect they may have on the project.

RISK ASSESSMENT CHECKLIST

A Risk Assessment Checklist will be used prior to the start of the festival to assess possible hazards or safety issues and mitigate or limit the likelihood of harm at the event. These are distinctly different than risks, but will be monitored in a similar process.

HEALTH AND SAFETY PLAN

The Operation Director will be responsible for updating and implementing the Health and Safety Plan in order to assess safety and health issues prior to the event.

INCIDENT REPORT PROCESS AND FORM

The Operations Director will be responsible for the implementation of the Incident Process and Form for any and all incidents that happen either during the planning process, prep or at the event.

HEALTH & SAFETY PLAN

INTRODUCTION

The policies and procedures described here apply to all volunteers address site-specific safety issues.

Health and Safety Policy

Responsibility

The Chairperson, Health and Safety Coordinator and Booth Leads are responsible for maintaining safe work practices in their respective units, including required health and safety training. Our department requires all Volunteers to comply with health and safety regulations, with departmental policies and procedures that apply to their own conduct on the job, and to report accidents, injuries, and unsafe conditions to their supervisor.

Health and Safety Coordinator

We have chosen one individual to serve as a Health and Safety Coordinator for the festival. This person has been given adequate authority to carry out the following responsibilities:

- Updating this Plan annually
- Provide assistance to supervisors and Volunteers as needed to resolve safety complaints
- Maintaining our organization's safety records

FUNDAMENTALS

New Volunteer Health and Safety Orientation

All our new Volunteers, including those that are permanent, temporary, or part-time, must receive instruction for the following:

- Evacuation procedures during an emergency;
- Location of fire extinguishers;
- Procedures for reporting all accidents and incidents to their supervisors and completing a written report;
- Procedures for reporting unsafe conditions or acts to their supervisors, and, when possible, taking action to correct unsafe conditions;
- Exact location of first-aid kits and identification of first-aid certified Volunteers;
- Use and care of any personal protective equipment they are required to use;

Emergency Evacuation and Operations Plan (EEOP)

All University employing units must develop procedures for evacuation in an emergency and for response to fires, bomb threats, chemical spills, earthquakes, etc. We have attached our EEOP to this document (or referenced location if located elsewhere). **(It is usually based on the layout of a whole building which may contain several departments).** The EEOP contains:

- a. Building floor plans that show safety equipment and exit pathways;
- b. Evacuation procedures;
- c. Evacuation assembly point(s);
- d. Methods for accounting for staff, students, visitors;
- e. Areas of refuge for mobility-impaired occupants.

All volunteers must be trained in the EEOP.

Medical Emergencies

All medical emergencies must be reported to the nearest Emergency Medical Services (EMS), usually 911.

Report form to supervisor and H&SC

All accidents *and near misses* must be reported to the employee's supervisor and EH&S as soon as possible. Near misses are valuable opportunities to correct unsafe situations, which under slightly different circumstances, would result in serious injury.

First Aid Kits and CPR Given

Quick and effective first-aid for an injured person results from the availability of strategically located first-aid kits and first-aid/CPR certified individuals whenever department staff are working. Adequate *access* to these resources is addressed in this section.

Department First Aid

Certified first-aid and CPR assistance is available Volunteers by:

First Aid Kits

Locations and sizes of first-aid kits in our department are listed below. First-Aid Kits are inspected periodically so they can be restocked before running out of an item.

Safety Problems: Reporting and Resolving:

Volunteers are encouraged to report safety concerns to their supervisor. If Volunteers do not feel they can do this, or have done so and do not feel the problem has been resolved, they may discuss the situation directly with their safety coordinator or safety committee representative.

Safety Meetings: Supervisor Leadership

Supervisors can promote health and safety in formal safety meetings or in regular staff meetings, but either way, discussion of safety issues needs to be documented. Formal safety meetings are held as described below, including organizational policy, meeting frequency, responsibility for minutes, location of minutes, and how part-time Volunteers can participate or be informed.

ACCIDENT/ILLNESS PREVENTION

Reduction of hazards

When possible, we modified or designed our facilities and equipment to eliminate employee exposure to hazards. Where engineering controls are not possible, we have instituted work practice controls that effectively prevent employee exposure to the hazard. When these methods of control are not possible or not fully effective, we require the use of personal protective equipment (PPE), such as safety glasses, hearing protection, etc.

Personal Protective Equipment

Personal protective equipment (PPE) is used as a "last line of defense" for some hazards, particularly chemicals. Our hazard assessment and training documentation is located _____.

- Hazard Assessed, (site, evaluator, date, supervisor verifying)
- PPE Selected
- Type and frequency of Training

Alaska Greek Festival Risk Assessment Checklist

Activity/task/hazard	Yes	No / NA	Additional controls
Plan/timetable developed to stagger arrival and set up times	<input type="checkbox"/>	<input type="checkbox"/>	
Site plan developed — clearly defined areas for vendors	<input type="checkbox"/>	<input type="checkbox"/>	
Restrict access to essential personnel during set up	<input type="checkbox"/>	<input type="checkbox"/>	
Vendors/Contractors provided with Map and bump in instructions, including:	<input type="checkbox"/>	<input type="checkbox"/>	
· Access and exit points	<input type="checkbox"/>	<input type="checkbox"/>	
· No vehicle areas/zones	<input type="checkbox"/>	<input type="checkbox"/>	
· Parking during set up	<input type="checkbox"/>	<input type="checkbox"/>	
· Speed limits	<input type="checkbox"/>	<input type="checkbox"/>	
Traffic and parking			
Restricted pedestrian access during set up	<input type="checkbox"/>	<input type="checkbox"/>	
Provision of access for emergency vehicles and personnel	<input type="checkbox"/>	<input type="checkbox"/>	
Traffic management if required (give details)	<input type="checkbox"/>	<input type="checkbox"/>	
Traffic management staff to wear high visibility vests	<input type="checkbox"/>	<input type="checkbox"/>	
Clear signage	<input type="checkbox"/>	<input type="checkbox"/>	
Adequate parking facilities for people with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	
Parking attendants required	<input type="checkbox"/>	<input type="checkbox"/>	
Personnel and Contractor Management			
All Contractors have been provided with appropriate Contractor Induction guide	<input type="checkbox"/>	<input type="checkbox"/>	
All Contractors and their workers have completed appropriate online contractor induction module	<input type="checkbox"/>	<input type="checkbox"/>	
All personnel and Contractors aware of event emergency management plan	<input type="checkbox"/>	<input type="checkbox"/>	
All personnel and Contractors have contact details for:	<input type="checkbox"/>	<input type="checkbox"/>	
· Event Manager	<input type="checkbox"/>	<input type="checkbox"/>	
· Other	<input type="checkbox"/>	<input type="checkbox"/>	
Contractors have submitted risk assessments (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	

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Activity/task/hazard	Yes	No / NA	Additional controls
Safe Work Method Statement required for any high-risk work (eg if there is a potential to fall greater than 2m)	<input type="checkbox"/>	<input type="checkbox"/>	
All contractors have received a site induction	<input type="checkbox"/>	<input type="checkbox"/>	
Personnel and Contractors have been provided with a copy of the event emergency plan	<input type="checkbox"/>	<input type="checkbox"/>	
Alcohol			
No one under 21 allowed to handle or access alcohol	<input type="checkbox"/>	<input type="checkbox"/>	
Alcohol license obtained and displayed	<input type="checkbox"/>	<input type="checkbox"/>	
All persons responsible for the service of alcohol must be TAMS Certified	<input type="checkbox"/>	<input type="checkbox"/>	
All guidelines are to be followed	<input type="checkbox"/>	<input type="checkbox"/>	
All rules and regulations must be obeyed	<input type="checkbox"/>	<input type="checkbox"/>	
Event signage			
Access and egress points are clearly signed	<input type="checkbox"/>	<input type="checkbox"/>	
Any restricted entry areas are adequately signed	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency exit pathways are clearly signed (indoor events)	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency assembly areas are adequately signed	<input type="checkbox"/>	<input type="checkbox"/>	
Site maps available	<input type="checkbox"/>	<input type="checkbox"/>	
Set-up/assembly			
Restricted public access during set up	<input type="checkbox"/>	<input type="checkbox"/>	
Equipment installed in accordance with manufacturer's guidelines	<input type="checkbox"/>	<input type="checkbox"/>	
All free standing objects (marquees, pin boards etc) are weighted and/or secured	<input type="checkbox"/>	<input type="checkbox"/>	
Qualified, experienced Contractors used for equipment assembly	<input type="checkbox"/>	<input type="checkbox"/>	
Amenities			
Sufficient toilets and hand washing facilities for expected number of attendees	<input type="checkbox"/>	<input type="checkbox"/>	
Adequate amenities provision for people with disabilities	<input type="checkbox"/>	<input type="checkbox"/>	
Adequate drinking water available for attendees	<input type="checkbox"/>	<input type="checkbox"/>	
Power			
USC approved electrician used for electrical set up	<input type="checkbox"/>	<input type="checkbox"/>	

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Activity/task/hazard	Yes	No / NA	Additional controls
All portable electrical equipment/tools, leads and power boards tested and tagged as required	<input type="checkbox"/>	<input type="checkbox"/>	
No daisy chaining of extension cords and power boards	<input type="checkbox"/>	<input type="checkbox"/>	
Leads connections etc are protected from weather or any other liquid	<input type="checkbox"/>	<input type="checkbox"/>	
All leads secured	<input type="checkbox"/>	<input type="checkbox"/>	
Leads/cables not to be placed across thoroughfares	<input type="checkbox"/>	<input type="checkbox"/>	
Generators, if used, safely positioned and access to area restricted	<input type="checkbox"/>	<input type="checkbox"/>	
Slips trips and falls			
Pathways and thoroughfares kept free of trip hazards	<input type="checkbox"/>	<input type="checkbox"/>	
Site assessment/inspection to identify trip hazards — plan set up to avoid trip hazards	<input type="checkbox"/>	<input type="checkbox"/>	
Signage where necessary	<input type="checkbox"/>	<input type="checkbox"/>	
Noise			
Noisy activities are planned for time of least disturbance of other activities	<input type="checkbox"/>	<input type="checkbox"/>	
People who may be affected by nuisance noise have been alerted to time and duration of noise	<input type="checkbox"/>	<input type="checkbox"/>	
Security			
Security have been kept informed about event	<input type="checkbox"/>	<input type="checkbox"/>	
Any activity which may produce smoke, fire or dust has been reported to Security prior to the event	<input type="checkbox"/>	<input type="checkbox"/>	
The requirement for additional fire fighting equipment has been communicated to Security/Facilities Management	<input type="checkbox"/>	<input type="checkbox"/>	
Waste management			
Adequate bins have been provided	<input type="checkbox"/>	<input type="checkbox"/>	
Bin emptying has been arranged	<input type="checkbox"/>	<input type="checkbox"/>	
All personnel involved in manual handling have received appropriate training	<input type="checkbox"/>	<input type="checkbox"/>	
Hand Carts are available for the movement of heavy items	<input type="checkbox"/>	<input type="checkbox"/>	
Weather			
Web site is accessed to check for forecast adverse weather events	<input type="checkbox"/>	<input type="checkbox"/>	
An extreme weather contingency has been planned (eg cancellation, postponement, venue change etc)	<input type="checkbox"/>	<input type="checkbox"/>	
Occupancy limits (indoor events)			

Alaska Greek Festival Event Management Plan
Murrell, Allison PM 686B Spring 2016

Activity/task/hazard	Yes	No / NA	Additional controls
Occupancy limit for the venue has been checked and is appropriate for expected number of attendees	<input type="checkbox"/>	<input type="checkbox"/>	
Bites/sting			
Grass and grounds maintained	<input type="checkbox"/>	<input type="checkbox"/>	
Trained first aid officers on site	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency planning			
Event personnel have completed necessary emergency procedures training	<input type="checkbox"/>	<input type="checkbox"/>	
Event emergency plan has been documented and communicated to all event personnel (including method of communication in the event of emergency —	<input type="checkbox"/>	<input type="checkbox"/>	
Security have been provided with copy of event emergency plan	<input type="checkbox"/>	<input type="checkbox"/>	
General emergency information communicated in public address	<input type="checkbox"/>	<input type="checkbox"/>	
General			
There is a procedure for lost children	<input type="checkbox"/>	<input type="checkbox"/>	
Cash handling procedures in place	<input type="checkbox"/>	<input type="checkbox"/>	
Local police have been informed of the event	<input type="checkbox"/>	<input type="checkbox"/>	
If the event, or part thereof, is likely to effect the surrounding community — they have been informed	<input type="checkbox"/>	<input type="checkbox"/>	
Contractors and vendors aware that their equipment is their own responsibility (even when left on campus overnight or out of business hours)	<input type="checkbox"/>	<input type="checkbox"/>	
Event specific hazards			
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	

Checklist/risk assessment completed by:	
Signature:	Name:
Approved by:	
Name:	
Position:	

INCIDENT REPORTING PLAN

The purpose of this procedure/guideline is to outline the requirements, methods and outcomes of reporting all occupational diseases, illnesses and incidents.

The following types of event, injury and/or illnesses will be reported, regardless of the nature or severity of the event:

- Fatality
- Critical injury/illness
- Illness or injury for which an person receives/seeks medical attention
- First aid treatment
- Property damage
- Near-miss
- Fire
- Environmental release
- Explosions
- Exposures to biological, chemical or physical agents

A person who sustains an injury or becomes ill as a result of workplace conditions or work activity must verbally report the injury or illness to a manager/supervisor immediately (not necessarily their own).

The manager/supervisor of the area, upon being notified of the injury or illness must:

- Promptly ensure that first aid is administered by a qualified first aid provider.
- Ensure the person is given subsequent medical treatment if necessary, provide emergency transportation to treatment if necessary; and record any such treatment.
- Complete an *Incident Reporting Form* and distribute to the person. If the following occurs: fatalities, critical injuries, occupational illness, property damage, fire or environmental release, refer to the accident/incident investigation procedure. A formal investigation is required.
- Ensure the appropriate personnel (the person, manager/supervisor, workplace health, rehabilitation services, occupational health and safety, the applicable union/person group, etc.) within the organization are notified.

Evaluation

Compliance with the injury/illness reporting procedures are monitored regularly as part of the manager/supervisor's responsibilities. The procedure will be reviewed annually to ensure it remains current.

Incident Report Form

Use this form to report accidents, injuries, medical situations, or behavior incidents. If possible, the report should be completed within 24 hours of the event. Submit completed forms to the Chairperson.

INFORMATION ABOUT PERSON INVOLVED IN THE INCIDENT

Full Name			
Home Address			
<input type="checkbox"/> Staff	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Visitor	<input type="checkbox"/> Vendor
Phone Numbers	Home	Cell	Work

INFORMATION ABOUT THE INCIDENT

Date of Incident	Time	Police Notified <input type="checkbox"/> Yes <input type="checkbox"/> No
Location of Incident		
Description of Incident (what happened, how it happened, factors leading to the event, etc.) Be as specific as possible (attached additional sheets if necessary)		
Were there any witnesses to the incident? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, attach separate sheet with names, addresses, and phone numbers.		
Was the individual injured? If so, describe the injury (laceration, sprain, etc.), the part of body injured, and any other information known about the resulting injury(ies).		
Was medical treatment provided? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Refused If yes, where was treatment provided: <input type="checkbox"/> on site <input type="checkbox"/> Urgent Care <input type="checkbox"/> Emergency Room <input type="checkbox"/> Other		

REPORTER INFORMATION

Individual Submitting Report (print name)
Signature
Date Report Completed

FOR OFFICE USE ONLY

Report Received by _____

Date _____

FOR OFFICE USE ONLY

Document any follow-up action taken after receipt of the incident report.

[illegible]

STAKEHOLDER MANAGEMENT PLAN

The Stakeholder Management Strategy for the Alaska Greek Festival will be used to identify and classify project stakeholders; determine stakeholder power, interest, and influence; and analyze the management approach and communication methodology for project stakeholders. This will allow us to identify key influential stakeholders to solicit input for project planning and gain support as the event progresses. This will benefit the project by minimizing the likelihood of encountering competing objectives and maximizing the resources required to complete the project.

Early identification and communication with stakeholders is imperative to ensure the success of the event by gaining support and input for the project. Some stakeholders may have interests which may be positively or negatively affected by the festival. By initiating early and frequent communication and stakeholder management, we can more effectively manage and balance these interests while accomplishing all project tasks.

IDENTIFY KEY STAKEHOLDERS

The following criteria will be used to determine if an individual will be included as a stakeholder:

- 1) Will the person or their organization be directly or indirectly affected?
- 2) Does the person or their organization hold a position from which they can influence or resist change? Or potentially benefit?
- 3) Does the person have an impact on the event's resources (material, personnel, funding)?
- 4) Does the person/ organization have any special skills or capabilities the event requires?

Any individual who meets one or more of the above criteria will be identified as a stakeholder. Stakeholders from the same organization will be grouped in order to simplify communication and stakeholder management.

Once key stakeholders are identified, the festival subcommittee will develop a plan to obtain their feedback on the level of participation they desire, frequency and type of communication, and any concerns or conflicting interests they have.

STAKEHOLDER ANALYSIS

Once all stakeholders have been identified, the project team will categorize and analyze each stakeholder. The purpose of this analysis is to determine the stakeholders' level of power or influence, plan the management approach for each stakeholder, and to determine the appropriate levels of communication and participation each stakeholder will have on the project.

Once all stakeholders have been identified, the project team will utilize the Stakeholder Analysis Template to establish stakeholders and their needs, wants and concerns on the event.

This template helps the owner of a stakeholder relationship to determine the best approach to managing that stakeholder. This template may not be appropriate for all stakeholders, but should be used for major ones.

Stakeholder Name			
Relationship owned by			
Stakeholder's role		Stakeholder's bias	Choose an item.
What does the stakeholder want to get out of the project, what does success mean to them?			
What are the stakeholder's specific priorities?			
1. 2. 3. 4. 5.			
What is the stakeholder most concerned about, what do they fear going wrong?			
Prioritize the project constraints from the perspective of this stakeholder (highest to lowest)			
1. 2. 3. 4.			
<u>Management Approach</u>			
Communication method		Communication frequency	
Areas to focus on			
Areas to minimize			
Issue areas requiring immediate escalation			

Guidelines for template

This strategy should be reviewed regularly as it may need to evolve as the project proceeds and/or the stakeholder's needs evolve.

- **Stakeholder name** – The person that this strategy is for.
- **Relationship owned by** – The project team member responsible for the relationship.
- **Stakeholder's role** – What role does the stakeholder play on the project? Examples include sponsor, customer, resource owner, etc. There may be multiple roles.
- **Stakeholder's bias** – How does the stakeholder feel about the project? There are three options: positive, neutral and negative. A positive bias indicates that the stakeholder wants the project to succeed, a negative bias implies that they want the project to fail and a neutral bias implies a lack of concern over the project outcome.
- **What does the stakeholder want to get out of the project?** – This should be a description summarizing the stakeholder's views of the project as a whole.
- **What are the stakeholder's specific priorities?** – This should be a list in decreasing priority order of what the stakeholder wants to get out of the project. It may be tangible deliveries, or it may be less obvious benefits.
- **What is the stakeholder most concerned about?** – This field should identify those areas of the project that are likely to be the most concerning.
- **Prioritize the project constraints** – This section should be completed in conjunction with the stakeholder and is designed to help understand what is most important. This helps to identify not just interest areas but also to help the project team member get what they need from the stakeholder by appealing to the stakeholder's priorities.

Management approach fields

These are for the team member to establish how they will manage the relationship.

- **Communication method** – How the team member will communicate with the stakeholder – e-mail, telephone, in person, etc.
- **Communication frequency** – How often the team member will meet with/communicate with the stakeholder.
- **Areas to focus on** – These are the elements of the project that the team member should emphasize during updates. These should align with the stakeholder's interest and concern areas as well as reflecting the priority of the project constraints.
- **Areas to minimize** – These are the elements of the project that the team member should de-emphasize during updates. These are the areas that do not align with the stakeholder's interest and concern areas as well as reflecting the lower priority project constraint elements.
- **Issue areas requiring immediate escalation** – These are the areas of the project where any issues or challenges should be communicated to the stakeholder immediately to minimize any problems with the stakeholder and/or to leverage any assistance that the stakeholder can provide.

Alaska Greeek Festival Stakeholder Registry									
Project Name:					Project Manager:			Date:	
Who	What				How	Who	When	Other	
Stakeholder	Role	Influence High/Low	Interest High/Low	Support Neutral Against	Monitor Inform Satisfy Manage	Strategy	Strategy Owner	Strategy Date	Comments

Stakeholder: Enter the names of the project stakeholders

Stakeholder's Role: Enter the stakeholders role in the project

Influence High/Low: Use the dropdown box to enter the stakeholders level of influence in the project (Select High or Low)

Interest High/Low: Use the dropdown box to enter the stakeholders level of interest in the project (Select High or Low)

Monitor, Inform, Satisfy or Manage: Use the dropdown box to select an approach for the stakeholder based on their level of influence and level of interest:

- *High influence/High interest:* Manage by fully engaging them in the process
- *High influence/Low interest:* Satisfy with levels of communication necessary to meet their needs
- *Low influence/Low interest:* Monitor for changing needs and interests

Strategy: Enter a strategy action based on the selection of monitor, inform, satisfy, or manage

Strategy Owner: Enter a strategy action owner

Strategy Date: Enter a strategy action date

Comments: Enter necessary comments based on the stakeholder line item

COMMUNICATIONS MANAGEMENT PLAN

This Communications Management Plan sets the communications framework for the planning of this event. It will serve as a guide for communications throughout the life of the event and will be updated as communication needs change. It also includes a communications matrix which maps the communication requirements of this event. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings.

Event communications should be professional and effective but there is no standard template or format that must be used.

The following table presents contact information for all persons identified in this communications management plan.

Role	Name	Email	Phone
Chairperson			
Operations Manager			
Admin			
Finance			
Procurement			
Marketing/ PR			
Prep			
Grounds			

COMMUNICATIONS MATRIX

The following table identifies the communications requirements for this event.

Event	Objective of Communication	Medium	Frequency	Deliverable	Format
Kickoff Meeting	Introduce the event team and the event. Review event objectives and management approach.	• Face to Face	Once	• Agenda • Minutes	• Digital
Volunteer Meetings	Review status of the event with the team.	• Face to Face • Conference Call	As needed	• Agenda • Minutes • Event schedule	• Digital
Monthly Event Status Meetings	Report on the status of the event to management.	• Face to Face • Conference Call	Monthly	• Slide updates • Event schedule	• Digital
Event Status Reports	Report the status of the event including activities, progress, costs and issues.	• Email	Monthly	• Event Status Report • Event schedule	• Digital

MARKETING WORKSHEET

A Marketing Worksheet will be used to plan the strategic use of marketing to meet the goals and objectives of the event.

GUIDELINES FOR MEETINGS

Meeting Agenda

Meeting Agenda will be distributed 1 business day in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

Meeting Minutes

Meeting minutes will be distributed within 2 business days following the meeting. Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

Action Items

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting. The review of the new action items will include identifying the owner for each action item.

Meeting Chairperson

The Chairperson is responsible for distributing the meeting agenda, facilitating the meeting and distributing the meeting minutes. The Chairperson will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.

Note Taker

The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will give a copy of their notes to the Chairperson at the end of the meeting as the Chairperson will use the notes to create the Meeting Minutes.

Time Keeper

The Time Keeper is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Time Keeper will let the presenter know when they are approaching the end of their allocated time. Typically, a quick hand signal to the presenter indicating how many minutes remain for the topic is sufficient.

Parking Lot

The Parking Lot is a tool used by the facilitator to record and defer items which aren't on the meeting agenda; however, merit further discussion at a later time or through another forum. A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. The Parking Lot list is to be included in the meeting minutes.

Greek Festival Advertising

FREE

- Anchorage Press online events calendar
- Anchorage Visitors and Bureau online events calendar
- Alaska Dispatch online events calendar
- KTUU, Ch.2 online events calendar
- K-LOVE online events calendar/ PSA
- Churches of Anchorage online events calendar
- Spenard Builders Supply Sign (haven't done since 2012)
- Sears Mall Sign
- Arctic Roadrunner Sign
- Facebook page "Alaska Greek Festival"
- Craigslist
- Press Release
- Greek Fest flyer (put up at: Carrs, drop off at Kaladi's, Middle Way Café, Artic Roadrunner will put flyer on restaurant trays)

PAID ADVERTISING

- TV/Radio spots
- Banners
- Bus Signs

Marketing Plan Worksheet

Understanding your market

Who are your customers?

Who are your competitors?

Any other marketing activity you could be associated with?

Identifying opportunities

What are our strengths?

What could we improve on?

What opportunities are there?

What obstacles may you come up against?

Objectives

What are your objectives?

Strategy and action plan

Who is the target audience?

What products/services can we offer them?

How can we entice these people to take up the offer?

How do we communicate this offer?

Action Plan

Explanation:

Use the table below to summarise your strategy.

[illegible]

5 Reviewing your plan

Explanation:

Identify how you will know that your plan has been a success. Put timescales and measures for success against each activity in your action plan. Make sure that these are realistic, and set yourself measures to make sure you are on track and can reassess if not.

[illegible]

HUMAN RESOURCE PLAN

INTRODUCTION

Human resources management is an important part of the Alaska Greek Festival. The human resources management plan is a tool which will aid in the management of this event's human resource activities throughout the project until closure. The human resources management plan includes:

- Roles and responsibilities of team members throughout the project
- Project organization charts

The purpose of the human resources management plan is to achieve project success by ensuring the appropriate human resources are acquired with the necessary skills, resources are trained if any gaps in skills are identified, team building strategies are clearly defines, and team activities are effectively managed.

ROLES AND RESPONSIBILITIES

The roles and responsibilities for the Alaska Greek Festival are essential to project success. All team members must clearly understand their roles and responsibilities in order to successfully perform their portion of the project. For the Alaska Greek Festival the following project team roles and responsibilities have been established:

Event Sponsor

The event sponsor is the champion of the event and has authorized the event by signing the event charter. This person is responsible for the funding of the event and is ultimately responsible for its success. Since the Event Sponsor is at the executive level communications should be presented in summary format unless the Event Sponsor requests more detailed communications.

Chairperson

The Chairperson has overall responsibility for the execution of the festival as defined in the Alaska Greek Festival Best Practices Guide. As the person responsible for the execution of the event, the Chairperson is the primary communicator for the event, distributing information according to the Communications Management Plan.

Subcommittee

The Subcommittee provides strategic oversight. The purpose of the Subcommittee is to ensure the execution of the festival meets the stated goals of the festival charter. Subcommittee is made up of booth leads and other who are defined on the organizational chart as having authority and control over a section, or sections of the festival.

Volunteers (Prep, Grounds Crew, Event Team, Etc.)

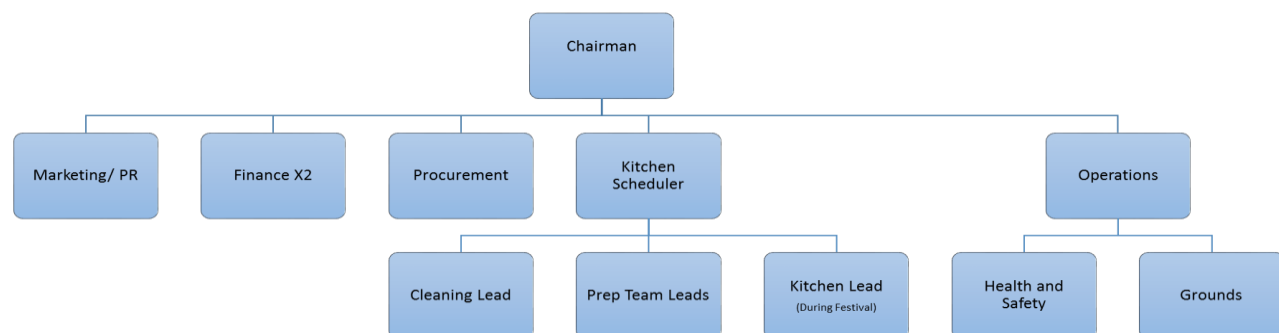
Volunteers are all persons who have a role performing work on the event. They need to have a clear understanding of the work to be completed and the framework in which the event is to be executed. This requires a detailed level of communications, which is achieved through interactions with the Operations Manager, Subcommittee Members and other team members.

ROLES AND RESPONSIBILITIES MATRIX

Greek Festival Roles & Responsibility Matrix							
RACI							
Responsible - R	Coordinates work and ensures it is complete. If they don't do the actual work, they contribute to it.						
Accountable - A	Accountable for the deliverable. Typically provides sign-off and confirmation deliverable is acceptable.						
Consulted - C	Consulted about the requirements for and progress of the deliverable. Can provide input and offer solutions.						
Informed - I	Informed or notified of the progress made on the deliverable along with its completion.						
DELIVERABLE	DELIVERABLE	SPONSOR	CHAIRPERSON	ADMIN	OPERATION	SUBCOMMITTEE	VOLUNTEERS
	INITIATION						
	<i>KICK-OFF MEETING</i>	I	R	I	I	R	I
	CHARTER SIGNED	A	R	I	I	R	I
	PLANNING						
	<i>MENU/ BAND DEFINED</i>					R	
	PROCUREMENT DEFINED		I		R		
	MARKETING/ PR DEFINED		I	R			I
	KITCHEN SCHEDULED		I		A		I
	IMPLEMENTATION						
	FOOD/ DRY GOODS ORDERED		I	R			I
	<i>FOOD PREP COMPLETE</i>		I	R	A	I	R
	PERMITS RECEIVED		I	R		I	
	RENTALS RESERVED		I	R		I	
	EVENT						
	<i>GROUND SET -UP COMPLETE</i>		I		A		R
	BOOTH SET-UP COMPLETE		I		A		R
	CLEAN UP COMPLETE		A	R	R		R
	CLOSEOUT						
	<i>CLOSE OUT PROCESS COMPLETE</i>		R	R	R	I	I
	<i>CLOSE OUT REPORT COMPLETE</i>	A	R	R	R	I	I

EVENT ORGANIZATIONAL CHART

An Event Organizational Chart will be used to clarify the structure of the event.



Alaska Greek Festival Volunteer Handbook

Introduction

Without our volunteers, we could not possibly complete all the tasks and all the work necessary to have a successful festival. As you enjoy the festival please help us consider the following so our patrons have a wonderful experience and we realize a prosperous festival.

Purpose/ Vision

We are here to help host Annual Alaska Greek festival at the Holy Transfiguration Greek Orthodox church to raise funds for the church and to exhibit Greek culture and cuisine to the local community, while implementing the most efficient use of limited resources to raise funds for the building of the new church.

History

The Greek Orthodox Church in Anchorage, Alaska, created the annual Alaska Greek Festival in August of 1995. The purpose of organizing that event was to raise enough money for the yearly operations of the church, and to eventually build a traditional, Byzantine styled church building.

The festival has been hosted for 20 years; each year getting bigger and better. The festival creates both revenue to build the church and a change for the Anchorage community to experience authentic Greek cuisine and culture.

The Alaska Greek festival is held on the grounds of the Holy Transfiguration Greek Orthodox church at 2800 O'Malley Road, Anchorage, AK 99507

Event Description

Host a three day Greek Festival on the second to last weekend of August at the Holy Transfiguration Greek Orthodox church.

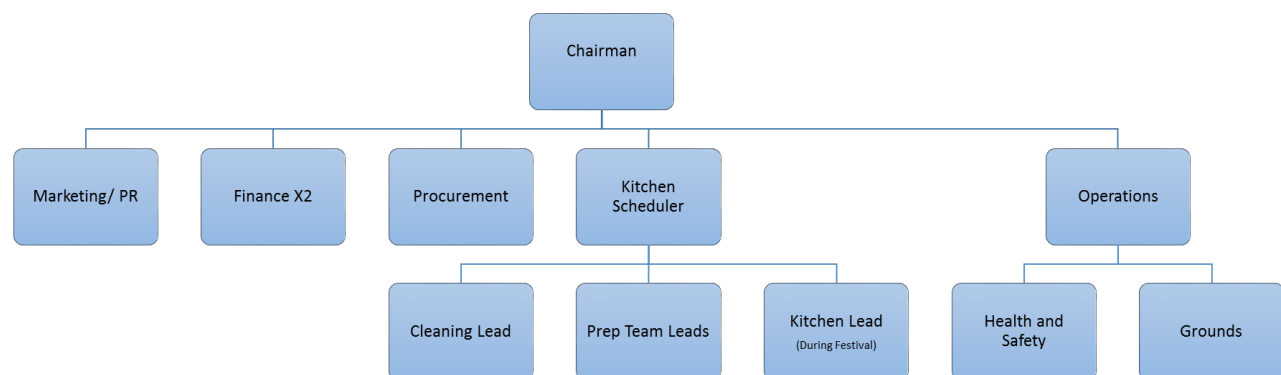
Event Objectives

Objective 1: Make money for building new church

Objective 2: Community experience authentic Greek culture and cuisine

Administrative Issues

Organizational Structure



Contact list

Name	Phone	Email	Position
			Chairperson
			Admin
			Operations
			Finace
			Marketing/ PR
			Procurement
			Kitchen Scheduler
			Grounds

Purchases & Reimbursement policy

Purchases

Purchases greater than \$250 are approved by the Chairperson.

Purchases greater than \$500 are approved by the Subcommittee.

Generally, NPO seeks three quotations for purchases greater than \$1000 where at least three suppliers are available for that service or product.

Reimbursements

A requisition form is prepared and approved when requesting personal reimbursement for NPO expenses. Relevant invoices and receipts are attached.

Operations Issue

Site Plan

The Alaska Greek Festival to be held Friday through Sunday (August _____) at Holy Transfiguration Greek Orthodox Church. This event is the annual church fundraiser that is open to the public. The scope of activities to be made available are dancing, live music, merchandise/dry goods sales, a silent auction, a vehicle auction, frozen/refrigerated food sales, cooked food sales, beverage sales, . The event will be held on the church campus and will encompass the entire site's facilities along with temporary event tents, stage, and portable lavatories. See the layout plan below.



Transportation & Parking Instructions

Parking at the Abbott O'Rabbit Ball Fields

To increase the amount of parking near the church for our patrons, please park at the Abbot O'Rabbit ball park and walk to the festival. The festival has a limited amount of parking, and we would like to make as much parking as possible be available to our guests.

Carpool

This helps reduce the amount of vehicles at the festival.

Equipment Operations

Please do not use equipment you feel unsafe or do not know how to safely operate. Request training and guidance from your supervisor before using equipment's to lessen the likelihood of injury.

Volunteers under the age of 18 cannot legal operate grills, fryers, electrical equipment and other designated equipment. Knives are also off limits.

Health and Safety Information

There will be (2) charcoal BBQ pits, (1) propane-fueled griddle, and (1) electric-powered fryer station located on the outdoor grounds for cooking. The BBQ pits and griddle are permanent structures with metal canopies, are located on the southern perimeter of the parking lot and are located so that they are 20 feet away from the tent where their food is being served.

The propane storage tanks secured with steel chains and are located behind the connex trailer approx. 20 feet to the east of the griddle and approx. 30+ feet from the service tent and public access.

The fryer station is a temporary piece of equipment set on a stainless steel table within a temporary metal enclosure located 20 feet away from the tent where its food is being served.

Alcohol is permitted to be consumed within the "beer garden" by persons 21 years of age and above. The purchase of alcohol is strictly regulated and any volunteer found in violation of the law will be asked to leave immediately.

Food Handling

Please make sure you are knowledgeable in all of the food safety before starting to volunteer. If you are not sure about something, please ask questions.

Volunteers are not required to have a food handlers permit if they are aware of the rules that apply to their work environment. In other words, you don't have to know all the rules that restaurants need to follow but you do need to know food safety rules that pertain to what you will be doing today.

Please ask questions if you are unsure about something. Food safety is our number one concern. We need to protect the clients who receive our food. We don't want to make them sick!

Handwashing

Hand washing must take at least 20 seconds (10-15 second scrubbing, a through rinsing and complete drying with paper towels). Make sure you know where the hand washing sink is. Wash hands before you start work, when changing tasks, and after the restroom.

Benefits

Alcohol and food for volunteers at free or discounted prices are decided upon before the festival. Please double check with Booth Leads or your supervisor if you have questions.

Please keep in mind that every drink you drink is a drink that can't be sold which means less funds are being raised to advance the festival goals which is to build the new church. Please be aware of the possible counter-productive nature of this action and enjoy with moderation.

Drunk volunteers will be sent home immediately. They will be responsible for assuring a sober ride home. The State of Alaska has strict liquor laws and they will be followed.

Communication Protocol

Event communications should be professional and effective but there is no standard template or format that must be used.

Should you have questions or concerns, please reach out first to the booth lead, or your supervisor to handle the matter. If it is still not resolved, feel free to contact the Operations Manager directly.

Schedules and shifts

Event schedule

An event schedule will be created to allow volunteers to sign up for volunteering. This will be managed by booth leads and they will be assisted by the Operations Manager to assure full coverage for the festival.

Training

Should any volunteer need training, please contact the Booth Lead you will be working with before you are scheduled to begin volunteering so they can properly schedule someone, or themselves, to train you and answer questions.

If you feel you are in need of additional training or are in need of a different volunteer position after training, please let your Booth Lead know as soon as possible. They will work to get you to a place where you can be more comfortable or better use your talents.

Checking in/ checking out

Please check in and out for your scheduled shift with your Booth Lead or supervisor.

Punctuality/ Absentee/ late Notification

Please let your Booth Lead or supervisor know if you are unable to attend, or if you are running late. This saves them from having to call you, or track you down, and they can contact other people to fill in the shift if needed.

Hazards

Hazards have been identified prior to the event by the Ground Crew and Operations Management. However, a hazard can pop up at any time. If you spot a hazard, or potential hazard please stop and contact with the Ground Manager or the Operations Manager immediately.

Emergency Procedures

We will be providing and maintaining 20+ feet wide (minimum) continuous designated fire lanes at all times. Fire lanes will have a maximum 150 foot access to all areas of the church and festival grounds. There will be designated traffic-control personnel on-site during hours of operation to enforce fire lane and pedestrian access.

During the hours of operation, there will be assigned personnel ('Operations Team') on-site designated to make public announcements and direct attendees and volunteers in the event of an emergency. These personnel will be in regular contact with each other via walkie-talkies.

In the event of emergency, the following emergency evacuation plan will be in effect:

1. Each booth chairperson will move their workers to 'Muster Point #1 or #2'
2. Call 911 – Caller stays on phone until emergency crew arrives
3. MC stops music & addresses crowd to move to 'muster point(s)'
4. Parking & traffic control stops traffic to move emergency vehicles through exit (emergency entrance)
5. Radios used for communication: Channel 18-0
6. Operations Team will clear area for medical emergency
7. Operation Team, Lead – _____, Cell Number _____

Fire Extinguishers

All outdoor cooking stations and the indoor commercial kitchen will be provided with K-rated fire extinguishers (with current inspection tags) and all food service areas will be provided with 2A10BC fire extinguishers. Volunteers working in these areas will know their locations and will be trained in their proper use.

Behavioral Expectations

Smoking policy

There is a no smoking policy at the festival. Please be a good example to our guests and don't smoke.

If you are caught smoking, you will be reminded about the no smoking policy and asked to stop.

Guest relations

Please remember that this event would not be possible if not for the generous guest who come year after year to experience a bit of Greek culture and cuisine for the day. Please be polite with guests.

Please talk to people, answer questions or just engage in pleasant conversation about the weather.

Customer service

Don't be stingy → it's a Greek festival. Follow the portion control guideline set by the booths and if anyone is angry, please direct them to the Booth Leads or the Operations Manager who can help handle the issue and get them to a place of resolution.

Media contact

Please send any requests from the Media to the Operations or Marketing manager.

Unacceptable behaviors

The following behaviors are considered unacceptable for volunteers. Volunteers who engage in these behaviors will be asked to leave immediately.

- **Harassment/ violence**
- **Theft**
- **Disregard for safety**
- **Offensive language or behavior**

Conflict resolution

If a guest complaint cannot be handled due to any reason, please contact the Booth Leads, or Operations Manager as quickly as possible. Give them the benefit of the doubt and let them vent. Don't agree or disagree.

If you feel they are personally attacking you or you just don't want to get yelled at anymore, feel free to politely inform them that you need to leave, but the Booth Lead or Operations Manager will be here soon to help resolve the issue.

Complaints

If there are any staff complaints, from either guests or other volunteers, the Operations Manager will address these directly, but without malice.

Incident Reporting Procedure

There is an Incident Reporting procedure and form. If you witness or experience an incident, as defined in the Incident reporting procedures, please contact your supervisor and submit the completed form for processing.

Innovating Idea?

Please contact the Operations Manager if you have an innovative idea on how something can be done better, or a new feature can be added to the festival. The Operations Manager will help you fill out some paperwork to help define your idea and submit it to the Chairperson for review.

Waiver

Please read and sign the attached waiver and return to either the Operations Manager or the Chairperson. Waiver must be signed before volunteer can begin volunteering.

Anyone who has not submitted a signed waiver will be asked to stop whatever they are doing and sign one or be asked to leave immediately.

SAMPLE VOLUNTEER LIABILITY RELEASE FORM

Volunteer Liability Release Form

(Note: All liability forms should be reviewed by a lawyer)

In consideration of my desire to serve as a volunteer in relief efforts to be conducted by _____ I hereby assume all responsibility for any and all risk of property damage or bodily injury that I may sustain while participating in any voluntary relief effort, disaster exercise or other activity of any nature, including the use of equipment and facilities of _____.

Further, I, for myself and my heir, executors, administrators and assigns, hereby release, waive and discharge _____ and its officers, directors, employees, agents and volunteers of and from any and all claims which I or my heirs, administrators and assigns ever may have against any of the above for, on account of, by reason of or arising in connection with such volunteer relief efforts or my participation therein, and hereby waive all such claims, demands and causes of action.

Further, I expressly agree that this release, waiver and indemnity agreement is intended to be as broad and inclusive as permitted by the State of _____, and that if any portion thereof is held invalid, it is agreed that the balance shall, notwithstanding, continue in full legal force and effect.

I currently have no known mental or physical condition that would impair my capability for full participation as intended or expected of me.

Further, I have carefully read the foregoing release and indemnification and understand the contents thereof and sign this release as my own, free act.

Date: _____ Signature: _____ Print Name: _____

SAMPLE VOLUNTEER LIABILITY RELEASE FORM

Parental Consent Form

(Note: All liability forms should be reviewed by a lawyer)

** If you 18 or over, you do NOT need a parental consent form.*

I, the parent or guardian of _____, give my voluntary consent to his/her participation in (Agency) 's _____.

I hereby release _____ the State of _____, the Board of Directors, _____ (Partner B) _____, and their officers, employees and agents from any and all liability resulting from events beyond control.

In the event of an accident, injury, or illness, the above stated and its agents do not assume any responsibility or obligation to provide financial assistance or other assistance, including but not limited to, medical, health, or disability insurance, in the event of an accident, injury, illness, death or property damage. In the event of an accident, injury, or illness, the above stated and its agents will make every effort to contact parents/guardians immediately if necessary.

Furthermore, I release _____ the State of _____, the Board of Directors, _____, and their officers, employees and agents and volunteers for any loss, personal injury, accident, misfortune, or damage to the above name or his/her property, with the understanding that reasonable precautions shall be taken to ensure the health and safety of the above name.

Signature of Parent/Guardian

Date

Printed Name of Parent/Guardian

(_____) _____
Phone Number

Participation Waiver

In consideration for participating in _____, during _____ I assume responsibility for all my actions while at _____, facilities, traveling to and/or from any such facility, or engaged in an activity under the supervision of my adult team leader, and/or _____ staff and volunteers.

Furthermore, I _____, the State of _____, the Board of Directors, _____ (Partner B) _____, and their officers, employees and agents and volunteers for any loss, personal injury, accident, misfortune or damage to myself or my property, with the understanding that reasonable precautions shall be taken to ensure the health and safety of myself and my property.

Signature of Participant

Printed Name

Date

Greek Festival Event Management Plan Volunteer Log						
ID	Name	Position	Functional Responsibility	Booth/ Section	Phone	Email
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
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17						
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24						
25						

PROCUREMENT MANAGEMENT PLAN

INTRODUCTION

This Procurement Management Plan sets the procurement framework for this project. It will serve as a guide for managing procurement throughout the life of the project and will be updated as acquisition needs change. This plan identifies and defines the items to be procured, the types of contracts to be used in support of this project, the contract approval process, and decision criteria. The importance of coordinating procurement activities, establishing firm contract deliverables, and metrics in measuring procurement activities is included.

PROCUREMENT MANAGEMENT APPROACH

The Chairperson will provide oversight and management for all procurement activities under this project. The Chairperson will work with the Subcommittee to identify all items to be procured for the successful completion of the project. The procurement lead will review the items, determine whether it is advantageous to make or buy the items, if they can be secured via donation, and if not, the Procurement lead will begin the vendor selection, purchasing and the contracting process.

The following individuals are authorized to approve purchases for the event:

<u>Name</u>	<u>Role</u>
_____	Chairperson
_____	Procurement Lead
_____	Operation Manager

TYPE OF CONTRACT TO BE USED

All items and services to be procured for this project will be solicited under firm-fixed price contracts. The project team will work with the Procurement lead to define the item types, quantities, services and required delivery dates. The Procurement lead will then solicit bids from various vendors in order to procure the items within the required timeframe and at a reasonable cost under the firm fixed price contract once the vendor is selected.

COST DETERMINATION

For this project, we will issue a Request for Proposal (RFP) in order to solicit proposals from various vendors which describe how they will meet our requirements. All information must be included in each proposal as the proposals will be used as the foundation of our selection criteria. Proposals which omit solicited information or contain incomplete information will be discarded from consideration.

Purchases less than \$1000 only require the approval of the Chairperson; whereas, purchases greater than \$1000 must be approved by the Subcommittee. For these larger purchases, the Subcommittee will meet to determine which contract will be accepted.

PROCUREMENT CONSTRAINTS

There are several constraints that must be considered as part of the project's procurement management plan. These constraints will be included in the RFP and communicated to all

vendors in order to determine their ability to operate within these constraints. These constraints apply to several areas which include schedule, cost, scope, resources, and technology:

Schedule:

- Project schedule is not flexible and the procurement activities, contract administration, and contract fulfillment must be completed within the established project schedule.

Cost:

- Project budget has contingency and management reserves built in; however, these reserves may not be applied to procurement activities. Reserves are only to be used in the event of an approved change in project scope or at management's discretion.

Scope:

- All procurement activities and contract awards must support the approved project scope statement. Any procurement activities or contract awards which specify work which is not in direct support of the project's scope statement will be considered out of scope and disapproved.

Resources:

- All procurement activities must be performed and managed with current personnel. No additional personnel will be hired or re-allocated to support the procurement activities on this project.

DECISION CRITERIA

The criteria for the selection and award of procurement contracts under this project will be based on the following decision criteria:

- Ability of the vendor to provide all items by the required delivery date
- Quality
- Cost
- Comparison of outsourced cost versus in-sourcing
- Past performance

These criteria will be measured by the contracts review board and/or the Project Manager. The ultimate decision will be made based on these criteria as well as available resources.

VENDERS AND DONORS LIST

A Vender and Donors list will be maintained and updated annually. This will serve to simplify the procurement process and at as a quick reference sheet for requests and thank you letters.

Required Permits

Municipality of Anchorage (MOA) – Special Activities Permit

- 1) Permit needs to be applied 45 days in advance of event
- 2) Permit can be found on MOA website
- 3) Permit includes
 - Special Activities
 - Fire
 - Noise
 - State Lane Closure
 - Automatically applied for with Special Activities Permit

- 4) Print all these permit applications separately
- 5) Attached to this permit:
 - Map of festival grounds showing all booths, tents, cook areas, etc.
 - Traffic Control Plan
 - Certificate of Liability from Church – shown separately (two forms):
 - Listing the State as additionally insured
 - Listing the MOA as additionally insured
- 6) This can all be sent as a package to the Traffic Department
- 7) Confirm with APD if officers will be used or private flaggers
- 8) Fire Inspector will call and schedule a drive through and walk through the week of the festival after grounds have been set up

Liquor Permit

- 1) Liquor Permit App needs to be picked up at the Alcoholic Beverage Control Board
- 2) Can be found on web - <http://www.dps.state.ak.us/ABC/permits.aspx>
 - Tudor & Boniface next to Trooper Station
- 3) Attach to this permit:
 - Map of the bar area in relationship to the grounds
 - Depict designated drinking area outlined in red
 - Church resolution stating that the festival will be held on an annual basis in August
 - Certificate of Liability from Licensed Sponsor (purchased from a separate insurance company – shown separately (two forms):
 - Listing the State as additionally insured
 - Listing the MOA as additionally insured
 - Only Beer and Wine are legally allowed to be served
- 4) This permit needs to be notarized
- 5) This permit needs to be signed by two Parish Council Members
- 6) Prior to submitting permit it needs to be approved by APD
- 7) Drop off final permit with all approvals and attachments to ABC Board or scan and email

Health Permit

- 1) Applied for at Department of Health and Human Services
 - 9th & L – 3rd Floor
- 2) List Total Menu
 - All foods being prepared and served
 - Stages of preparedness – raw to cooked, etc.
- 3) Requires current food managers certificate needs to be on file with the Department
- 4) Commissary letter needs to be filled out for any foods being prepared off sight
 - Other establishment preparing food needs to have a health permit
- 5) Inspection is typically done during first day of operation
- 6) A walk through will need to be made when inspector arrives

Parks & Rec Permit

- 1) Abbott O Rabbit Ball Field Use (for parking)

- 2) Reserve 1 Month Out
- 3) Call/Pick up key at Parks & Rec
- 4) Application is a letter of intent that can be emailed to you – apply at office

MASTER ORDER AND COSTING SPREADSHEET

A Master Order and Costing Spreadsheet has been created to simplify the procurement process. The Master Order and Costing spreadsheet containing several tabs that pull data into the first tab that acts as the master order sheet, and has additional columns for receiving/ inventory management.

This will alleviate miss-ordering, inadequate ordering, unknown status of product and eliminate last-minute purchases. This will help lower event costs and save funds for their event's goals and objectives.

The other tabs in the spreadsheet contain the products that will be produced for the event. By altering the number of batches, the spreadsheet will automatically update the amount of goods needed to be procured.

These tabs also contain the retail cost of the materials, and calculate based on serving size the cost of the individual product being produced. This information should be updated annually to assure a good value for the product being created to be sold for the event.

SPECIAL EVENT INSURANCE

Special event insurance will be purchased to mitigate liability for the church. This will be a Certificate of Liability from Licensed Sponsor purchased separately from an insurance company, specifically for the event.

Master Order sheet

Items to order	Amount Needed	Actual Amount	Vendor/ Donation	Amount Received	Date Received
#10 cans Crushed tomatoes	10				
#10 cans tomato sauce	10				
Allspice in lbs.	4				
Almond Extract or Amaretto (Tbsps.)	12				
Baker's Chocolate	5				
Baking Powder (Tbsps.)	240				
Baking Soda (Tbsps.)	33				
Bay leaves (by jar)	1				
Beef Base in lbs.	5				
Beef Broth in quarts	3				
Black Pepper in cups	9				
Butter by lbs.	463				
Chicken Broth powder in lbs.	1				
Chopped Almonds (cups)	35				
Cinnamon (sticks)	54				
Cinnamon stick in lbs.	2				
Cloves teaspoon	2				
Cognac (cups)	18				
Cream Cheese in lbs.	4				
Dijon Mustard in cups	5				
Dill in commercial size bags	9				
Dill weed in cups	2				
Dry basil in cups	1				
Dry garlic in cups	1				
Eggplant by case	12				
Eggs by dozen	118				
English cucumber by case	6				
Extra lean ground beef in lbs.	160				
Feta in lbs.	39				
Filo in lbs.	384				
Flour in cups	249				
Fresh mint in cups	7				
Garlic in cups	1				
Garlic in lbs.	10				
Graham Crackers (cellophane packages)	31				
Granulated Sugar (lbs.)	660				
Grape Leave jars by case	5				
Green Onions by bunches	21				
Ground Cinnamon (cups)	42				
Ground Cloves (tbsps.)	6				
Heavy Whipping Cream (gallons)	3				
High Gluten Flour (cups)	1820				
Honey (cups)	150				
Instant Yeast (tbsps.)	280				
Italian tomatoes by each	25				
Lamb, leg	18				
Lemon juice in cups	60				
Lemon pepper in cups	1				
Lemons	67				
Maraschino Cherries (reg. jars)	2				
Milk in gallons	48				
Montreal Steak Seasoning in lbs.	1				
Nutmeg (cups)	2				
Nutmeg in lbs.	2				
Olive Oil in cups	33				
Orange Juice (cups)	15				
Oranges	15				
Oregano in cups	4				
Orzo noodles	2				
Panko - Bread Crumbs 10 lbs. bag	1				
Parmesan cheese in lbs.	15				
Parsley by bunch	138				
Parsley in cups	1				
Pastitsio noodles extra long in lbs.	60				
Peeled garlic Costco jars (quarts)	2				
Pitted Kalamata olives in quarts	1				
Potatoes	100				
Powdered Sugar (lbs.)	16				

Red pepper flakes in Table spoons	2				
Red pepper in cups	0				
Red wine in bottles	20				
Red wine vinegar in cups	3				
Ricotta in lbs.	5				
Roasted Pistachios (cups)	10				
Rose Water (tbsps.)	1				
Salt (tsp.)	520				
Salt cups	3				
Semolina (cups)	32				
Sesame Seeds (tbsps.)	8				
Sesame seeds in lbs.	10				
Shredded Coconut (cups)	60				
Sour Cream in lbs.	120				
Spinach in lbs.	33				
Tomato paste in cups	10				
Vanilla (tbsps.)	44				
Vegetable Oil in cups	72				
Walnuts (Lbs.)	484				
White Onions Lbs.	100				
White pepper in cups	3				
White rice by lbs.	23				
White vinegar in gallons	2				
White wine in bottles	4				
Whole Cloves (big jars)	2				
Worcestershire sauce in cups	1				
Yellow Onion in lbs.	548				
Yogurt in lbs.	32				

Event Permit Description

EVENT DATE: August _____

EVENT NAME: Alaska Greek Festival

EVENT HOST: Holy Transfiguration Greek Orthodox Church

EVENT LOCATION: 2800 O'Malley Rd 99507

Fire/Safety Inspector:

This permit, narrative, and site layout are being submitted for your review for the annual Alaska Greek Festival to be held Friday through Sunday (August _____) at Holy Transfiguration Greek Orthodox Church. This event is the annual church fundraiser that is open to the public. The scope of activities to be made available are dancing, live music, merchandise/dry goods sales, a silent auction, a vehicle auction, frozen/refrigerated food sales, cooked food sales, beverage sales, . The event will be held on the church campus and will encompass the entire site's facilities along with temporary event tents, stage, and portable lavatories. Please refer to the enclosed comprehensive site plan for all specific locations & clearances of the following items:

TENTS:

Event tents are to be provided by Rowan Decorators and will meet appropriate flamespread/flammability ratings and code compliance. Tent side walls will only be used in (3) places on the back-sides (away from public access) of tents. This will allow for open circulation and therefore egress will not be limited. All cooking areas and propane cylinder storage will be a minimum of 20 feet away from all tents. There will be (2) areas of service underneath the 40'x80' using chafing (warming) dishes with sternos. There will be 'no smoking' signs posted through-out the grounds and underneath all tents.

FOOD SERVICE:

There will be (2) charcoal BBQ pits, (1) propane-fueled griddle, and (1) electric-powered fryer station located on the outdoor grounds for cooking. The BBQ pits and griddle are permanent CMU structures with metal canopies and are located on the southern perimeter of the parking lot and are located so that they are 20 feet away from the tent where their food is being served. The propane storage tanks secured with steel chains and are located behind the connex trailer approx. 20 feet to the east of the griddle and approx. 30+ feet from the service tent and public access. The fryer station is a temporary piece of equipment set on a stainless steel table within a temporary metal enclosure located 20 feet away from the tent where its food is being served.

FIRE EXTINGUISHERS:

All outdoor cooking stations and the indoor commercial kitchen will be provided with K-rated fire extinguishers (with current inspection tags) and all food service areas will be provided with 2A10BC fire extinguishers. Volunteers working in these areas will know their locations and will be trained in their proper use.

ELECTRICAL:

All outdoor power will be temporary and will derived from by a separate NEMA 3 panel. Temporary power from the panel will be distributed to (4) temporary 'spider boxes' and will connect all exterior festival infrastructure. Extension cords will be properly connected and safely

located so as to minimize tripping hazards. Lights and any other overhead electrical connections will be installed to provide adequate clearance above head (with proper tension), will be protected from rain water, and will be situated to prevent tampering.

EMERGENCY VEHICLE ACCESS & PUBLIC SAFETY PLAN:

We will be providing and maintaining 20+ feet wide (minimum) continuous designated fire lanes at all times. Fire lanes will have a maximum 150 foot access to all areas of the church and festival grounds. There will be designated traffic-control personnel on-site during hours of operation to enforce fire lane and pedestrian access.

During the hours of operation, there will be assigned personnel ('Operations Team') on-site designated to make public announcements and direct attendees and volunteers in the event of an emergency. These personnel will be in regular contact with each other via walkie-talkies.

In the event of emergency, the following emergency evacuation plan will be in effect:

1. Each booth chairperson will move their workers to 'Muster Point #1 or #2'
2. Call 911 – Caller stays on phone until emergency crew arrives
3. MC stops music & addresses crowd to move to 'muster point(s)'
4. Parking & traffic control stops traffic to move emergency vehicles through exit (emergency entrance)
5. Radios used for communication: Channel 18-0
6. Operations Team will clear area for medical emergency
7. Operation Team, Lead – _____, Cell Number _____



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

Date xx/xx/xxxx

Donor name

Company name

Address

City, State Zipcode

RE: 20xx GREEK FESTIVAL - AUGUST xxth, xxth, and xxth

Dear name of donor,

I would first like to thank you for all your support of the Greek Festival and our church. The 20xx event was one of our most successful festivals to date! Your continued generosity has made it possible to facilitate a profitable event year in and year out. The Greek Festival and our church would not be where it is today without you! We have been planning and are preparing for our event this year.

Please find the attached list of items and the dates that they are needed for this year's festival. Please let us know if there are any items unavailable for donation so we can make arrangements to procure from your company or another vendor if these are items you do not normally carry.

Our community thanks you in advance for your generosity in helping with this, our most important Church fundraiser. Your donations are tax deductible – our 501C (3) Tax ID is _____ for your records.

Thank you,

First name Last name

Greek Festival Chairperson

907-764-1464

Attachment (1)



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

At your earliest convenience

Item	Amount
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested

Monday, August xx, 20xx

Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested
Item request	Amount requested

QUALITY MANAGEMENT

INTRODUCTION

The Quality Management Plan is an integral part of any event. The purpose of the Quality Management Plan is to describe how quality will be managed throughout the lifecycle of the event. It also includes the processes and procedures for ensuring quality planning, assurance, and control are all conducted. All stakeholders should be familiar with how quality will be planned, assured, and controlled.

The Quality Management Plan for the Alaska Greek Festival Event will establish the activities, processes, and procedures for ensuring a quality product upon the conclusion of the event. The purpose of this plan is to:

- Ensure quality is planned
- Define how quality will be managed
- Define quality assurance activities
- Define quality control activities
- Define acceptable quality standards

QUALITY MANAGEMENT APPROACH

The quality management approach for the event will ensure quality is planned for both the product and processes. In order to be successful, this event will meet its quality objectives by utilizing an integrated quality approach to define quality standards, measure quality and continuously improve quality.

The focus is on the event's deliverables and the standards and criteria being used will ensure the product meets established quality standards and customer satisfaction.

Process quality for the event will focus on the processes by which the event deliverable will be created. Establishing process quality standards will ensure that all activities conform to an organizational standard which results in the successful delivery of the product.

METRICS

Metrics will be established and used to measure quality throughout the event life cycle for the product and processes. The Quality Manager will be responsible for working with the Subcommittee to define these metrics, conduct measurements, and analyze results. These product and process measurements will be used as one criterion in determining the success of the event and must be reviewed by the event sponsor.

Based on customer product requirements, internal process standards, and applicable industry standards, the following metrics have been established for the Alaska Greek Festival:

- a. **Recipe Guidelines:** The recipes that have been defined in the Alaska Greek Festival cookbook will be followed. There will be no exceptions without the written permission of the festival Chairperson.

- b. **Portion Control:** The Alaska Greek Festival was established in part to celebrate the unique and awesome Greek Culture. That culture is not a stingy one, so portions will be defined by Booth Lead and will be followed.
- c. **Wait Times:** The Alaska Greek Festival has had very long lines in the past. This is unhospitable and prevents guests from making second trips for additional purchases. These will be monitored to set acceptable wait times, thresholds and to devise alternative solutions for future festivals.
- d. **Process Flow:** The flow of guests at the festival will be measured to assure that there is ample space, and a good layout to maximize space usage.
- e. **Use Rate:** In order to allow for new activities, use rate will be measured to help determine impact of future change and development of the layout space, inclusion or removal of activities at future festival.

Metric	Standard	Frequency	Report
Recipe Guidelines	Will not alter defined recipes	Every prep and cooking activity	At end of activity
Portion Control	Will follow booth standards	Every serving	End of day
Wait Times	Will measure average wait time	Every ½ hour	End of day
Process Flow	Will measure movement through festival	Every 1 hour	End of day
Use Rate	Will measure use rate	Every activity	End of day

METRICS MEASUREMENT AND DATA COLLECTION

Quality metrics are a key component of an effective quality management plan and are the measurements used in ensuring customers receive acceptable products or deliverables. Quality metrics are used to directly translate customer needs into acceptable performance measures in both products and processes. They must be attributable to an established goal, threshold, or customer requirement or else they provide no value.

Once all measurements are completed, the Chairperson, Quality Manager, and Subcommittee will meet to review and compile data and develop their recommendations based on the findings. If any of the metrics have not been satisfied, the Quality Manager will include recommendations for correcting the metric in the Quality Management Plan. This may be a small change to a process parameter or consist of a larger scale process or product quality improvement initiative.

The Quality Manager will document these findings and consolidate them for the festival close-out report.

QUALITY REQUIREMENTS / STANDARDS

Product Quality:

The product quality standards and requirements will be determined by the Subcommittee and Quality Manager. There may be product-specific quality standards identified that are not currently part of the documented organizational standards. In this case, the Subcommittee will review these newly identified standards and incorporate them into organizational documentation if approved. They will also document any newly identified quality standards into the plan and ensure communication with all stakeholders.

Process Quality:

The process quality standards and requirements will be determined by the Subcommittee and Quality Manager. Many of these standards will be based on existing process standards. They will work to establish acceptable standards and document these standards for incorporation into both organizational process documents as well as the event plan. These standards will be communicated to all event stakeholders.

Quality improvements can be identified by anyone. Each recommendation will be reviewed to determine the cost versus benefit of implementing the improvement and how the improvement will impact the product or processes. If an improvement is implemented, the Chairperson will update all event documentation to include the improvement and the Quality Manager will update the organizational documentation the improvement affects.

QUALITY ASSURANCE

The quality assurance of the event focuses on the processes used in the manufacturing of the product. In order to ensure quality, an iterative quality process will be used throughout the event life cycle. This iterative process includes measuring process metrics, analyzing process data, and continuously improving the processes. The Quality Manager will perform assessments at planned intervals throughout the event to ensure all processes are being correctly implemented and executed.

The Quality Manager will provide day to day quality management and conduct process audits on a defined basis, monitor process performance metrics, and assure all processes comply with event and organizational standards. If discrepancies are found, the quality manager will meet with the Chairperson and review the identified discrepancies.

QUALITY CONTROL

The quality control of the event focuses primarily on the product and the acceptable standards and performance. The table below illustrates all performance and physical quality standards for the Product:

Product	Physical/Performance Standards	Quality Assessment Activities	Assessment Intervals
Baklava	Triangle; not burnt; moist; flaky	Visual inspection	After baking; after packaging; at time of sale
Gyro	Grilled meat; hot pita; No feta	Visual inspection	At time of sale
Loukoumades	Hot; sticky but not swimming in syrup	Visual inspection	At time of sale

It is imperative to the success of the event that all of the established physical and performance standards are met. By doing so, the Subcommittee will ensure that the product achieves the high level of customer satisfaction anticipated and that future operational cable production will be in line with budget and resource allocations.

QUALITY CONTROL MEASUREMENTS

All event products and processes must be measured and fall within the established standards and tolerances. The below logs will be used by the event and quality teams in conducting these measurements and will be maintained for use as supporting documentation for the event's acceptance.

Quality Assurance Log

Trial #	Date	Process Measured	Required Value	Actual Measured	Acceptable? (Y/N)	Recommendation	Date Resolved

Quality Control Log

Cable #	Date	Item Measured	Required Value	Actual Measured	Acceptable? (Y/N)	Recommendation	Date Resolved

Data Collection Dates: _____

[illegible]

CHANGE MANAGEMENT PLAN

CHANGE MANAGEMENT PROCESS

The Change Management process has been designed to make sure this approach is followed for all changes. This approach will prevent unnecessary change from occurring and focus its resources only on beneficial changes within the project scope.

The Change Management approach for the Alaska Greek Festival will ensure that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of the Alaska Greek Festival are approved and implemented.

DEFINITIONS OF CHANGE

There are several types of changes which may be requested and considered for the Alaska Greek Festival. Depending on the extent and type of proposed changes, changes project documentation and the communication of these changes will be required to include any approved changes into the project plan and ensure all stakeholders are notified. Types of changes include:

- **Scheduling Changes:** changes which will impact the approved project schedule.
- **Budget Changes:** changes which will impact the approved project budget. These changes may require requesting additional funding, releasing funding which would no longer be required, or adding to project or management reserves.
- **Scope Changes:** changes which are necessary and impact the project's scope which may be the result of unforeseen requirements which were not initially planned for. These changes may also impact budget and schedule. .

The project manager must ensure that any approved changes are communicated to the project stakeholders. Additionally, as changes are approved, the project manager must ensure that the changes are captured in the project documentation where necessary. These document updates must then be communicated to the project team and stakeholders as well.

CHANGE CONTROL BOARD

The Change Control Board (CCB) is the approval authority for all proposed change requests pertaining to the event. The purpose of the CCB is to review all change requests, determine their impacts on the project risk, scope, cost, and schedule, and to approve or deny each change request. The following chart provides a list of the CCB members for the Alaska Greek Festival:

Name	Position	CCB Role
	Sponsor	CCB Chair
	Chairperson	CCB Member
	Admin Lead	CCB Co-Chair
	Operations Lead	CCB Member

ROLES AND RESPONSIBILITIES

The following are the roles and responsibilities for all change management efforts related to the Alaska Greek Festival:

Sponsor:

- Approve all changes to budget/funding allocations
- Approve all changes to schedule baseline
- Approve any changes in project scope
- Chair the CCB

Chairperson:

- Receive and log all change requests from project stakeholders
- Conduct preliminary risk, cost, schedule, scope analysis of change prior to CCB
- Seek clarification from change requestors on any open issues or concerns
- Make documentation revisions/edits as necessary for all approved changes
- Participate on CCB
- Maintain Change Control Log

Project Team/Stakeholders:

- Submit all change requests on standard organizational change request forms
- Provide all applicable information and detail on change request forms
- Be prepared to address questions regarding any submitted change requests
- Provide feedback as necessary on impact of proposed changes

CHANGE CONTROL PROCESS

The Change Control Process for the Alaska Greek Festival will follow the organizational standard change process for all projects. The Chairperson has overall responsibility for executing the change management process for each change request.

- 1) Identify the need for a change– Change requestor will submit a completed change request form to the project manager.
- 2) Log change in the change request register– The Chairperson will keep a log of all submitted change requests throughout the project's lifecycle.
- 3) Evaluate the change– The Chairperson will conduct a preliminary analysis on the impact of the change to risk, cost, schedule, and scope and seek clarification from Subcommittee and the change requestor.
- 4) Submit change request to CCB– The Chairperson will submit the change request, as well as the preliminary analysis, to the CCB for review.
- 5) Obtain Decision on change request– The CCB will discuss the proposed change and decide whether or not it will be approved based on all submitted information.
- 6) Implement change– If a change is approved by the CCB, the Chairperson will update and re-baseline project documentation as necessary.

Alaska Greek Festival Change Request

Change Request Title:

Date of Request:

Name:

Change Request Assigned to:

Change Description

Background Reason for the Change:

[What is the impetus or catalyst for the change?]

Change Details:

[Describe the recommended change in detail.]

Impact of Delaying the Recommended Change:

[What will happen if the request is delayed?]

Impact of Rejecting the Recommended Request:

[What will happen if the request is rejected?]

Supporting or Related Documentation:

[Is there documentation that is related to the change request that is attached to this document or should be reviewed?]

Alternate Approaches Considered

[What are the alternative approaches the project may wish to consider or examine?]

Recommendation

Project Recommendation:

[What is the recommended approach that the project should proceed with?]

Impact of the Recommended Change on the Project:

[What is the impact of this change on the project? Consider the following categories:]

Change Items and Activities	Estimated Effort	
		Net Impact
Total Estimated Effort		
Total Estimated Cost Impact		
Revised Schedule End Date		

Related Changes/Initiatives:

[Are there other changes requests or initiatives that this change is related to?]

Decision

Approved:	<input type="checkbox"/>		
Deferred:	<input type="checkbox"/>	Defer Date:	
Cancelled:	<input type="checkbox"/>		
Rejected	<input type="checkbox"/>		
Researched	<input type="checkbox"/>		

Person	Approval Signature	Date Signed

Festival Set-Up Plan

Introduction

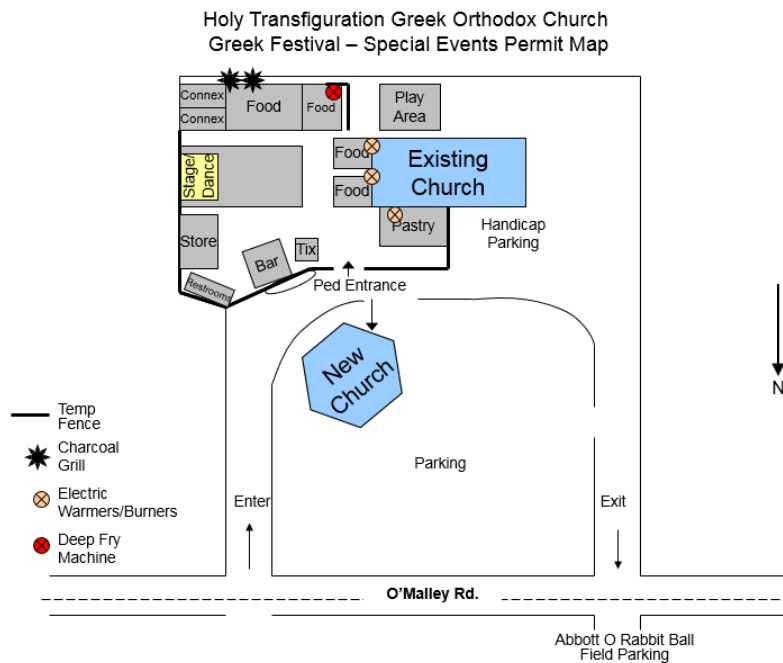
The ground prep work at the church must be completed before the Alaska Greek Festival can begin setting up for the festival. The ground prep work included power washing the parking lot, setting up the roadway signs, setting up the electrical layouts, checking fire extinguishers, and having the septic tank pumped.

This work is necessary to be completed before the festival set up can begin.

Festival Layouts

The layouts for the Alaska Greek Festival must be updated every year to assure the proper allocation of space and possible places for new or changing booths or activities. They are submitted with the permitting process several months before the festival and are to be followed to assure compliance with the permit.

The layout for the festival is as follows:



Grounds

The grounds around the festival contain several subgroups that are festival wide or are areas not covered by a booth or activity. These include items such as sanitation, Main Stage, Big Tent, Kafe table area, Parking/ Traffic Control/ Shuttles, and Porta Pottys.

Sanitation

Sanitation covers the entire festival. Good sanitation means a clean and safe festival for both guests and the volunteers. Sanitation will require several volunteers to manage throughout the festival. They will be responsible for set up hand washing stations, check on stations throughout the day to assure that they meet the prescribed standards, remove trash and sanitize tables or other things as needed, and be responsible for checking and changing out trash bins located across the festival grounds.

Main Stage

The main stage is set up by a vender. Decorations such as the Parthenon and the lights on the tent poles must be set up. Lighting will be set up by a vendor.

Band

The Greek Band will have needs that are stipulated in their contract that must be met. They will require equipment to be set up, either by them or a vendor, a sound check before the festival opens, and

Big Tent

The big tent is the primary place where guest come to eat, to listen to the band, and watch the Greek Dancers. The table and chairs are set up by a vendor. They must remain clean and useable for the benefit of the event guests.

Kafenio Area

The kafenio area tables are the primary place where guest come to eat pastries and the getaway from the hustle and bustle of the main tent. It is a quieter area that allows for conversation. The table and chairs are set up by a vendor. They must remain clean and useable for the benefit of the event guests.

Traffic Control/ Parking/ Shuttle

Traffic Control, Parking and the Shuttles are a vital requirement for the event. Guest need to be able to drive, park and walk safely to and from the event.

Traffic Control

The Anchorage Police Department manages traffic control on O'Malley Road. It is a requirement of the Special Event Permit because of the size of the event. This allows volunteers to be available for other tasks. It also assures the safety of the drives who are coming and going to the event, pedestrians, bicyclists and other drives who use O'Malley Road.

Parking

Parking and traffic flow within the event grounds are managed volunteers for the church. They manage flow of cars and pedestrians, and allow for the safe crossing pf pedestrians from the parking lot to the festival.

The parking volunteers will track the number of cars that number enters the grounds, and the number of people who enter the festival to monitor use rate and peak times.

Shuttle

The Shuttle allows for guest to park further away for the limited number of spaces at the grounds, to park at a local school and take a shuttle to the event. The Shuttle arrives every 15 minutes to allow for the greatest amount of hospitality.

The Shuttle Drives will track number of uses by trip to monitor peak use rates.

Porta Pottys

The Porta Pottys set up by a vender. Sanitation will be responsible for maintaining the grounds around them to keep them looking inviting. If there are problems with any of them, the vendor is to be contacted.

Administrative

There are several requirements for the festival that are administrative in nature and must be handled throughout the festival. These include data collection, Cash Drops, the ATM and the counting room.

Data Collection

Data collection is a requirement under the Quality Management Plan. Without proper data collection, it is difficult to know whether or not the event goals and objectives outlined in the Event Charter are being met. Further details are located in the Quality Management plan.

Cash Drops

Registers and Cash Drops are handled by the Money Counting office. Money is taken to the booths at set intervals, to remove cash and replace it with a set amount funds. The two person team then returns to the locked Money Counting office, and makes the booth name and time that it was collected. This process prevents the booths from having too much cash, cash in the wrong denominations and give strong data to use rate of the booths by time, over the life of the festival.

ATM

The onsite ATM is managed by the volunteers in the Money Counting office. It is provided by a vendor.

Food Booths

The Food Booths are managed by Booth Leads, and staffed with volunteers. Booth Leads are in charge of booth set up, cleaning and take down. They are responsible for the operation of the booths and managing the volunteers.

Gyro/ Souvlaki booth

The Gyro/ Souvlakis booth cooks and serves both gyros and souvlakis. They have two charcoal grills for the souvlakis and a propane grill for the gyros.

Loukoumades

The Loukoumades booth sells Loukoumades, Greek for “honey balls”. They are deep-fired bits of batter that are then soaked in a honey-sugar syrup and topped off with a cinnamon-sugar-walnut sprinkles.

Dinner booth

The Dinner booth serves hot Greek dinners.

Hot Dog/ Soda/ Ice Cream booth

The Hot Dog/ Soda/ Ice Cream booth sells hot dogs, soda and ice cream. They have baklava ice cream Sunday that is very popular and allows for the broken pieces of baklava that cannot be sold to be used.

Kafe

The Kafenio, or Kafe sells coffee, Greek Coffee, Greek Pastries and desserts. They are a large booth, and have large sales volume. They typically sell out by the end of the third day every year.

Taverna

Vendor handles all aspects of the Taverna. They are a major sponsor and donate all the proceeds to the festival.

Activities

There are several activities at the event. They are managed by Booth Leads, and staffed with volunteers. Booth Leads are in charge of booth set up, cleaning and take down. They are responsible for the operation of the booths and managing the volunteers.

Agora/ Deli

The Agora sells non-perishable Greek foods, jewelry, shirts, hats and other goods.

Greek Dancers

The Greek Dancers are a lively and much anticipated activity at the festival. The Dancers dress in Traditional Greek costumes, and perform traditional Greek Dances.

Church Tours

The new church is a Byzantium style church, built according to the religious standards. It is a unique piece of architecture and is filled with bright painting. Church Tours are held to show the beautiful church that was built with donations that were raised from previous festivals. It is also an opportunity to introduce people to the faith, and to ask questions.

The tours are led by the resident priest. The priest lets the guests into the sanctuary, offers a brief lecture on the Greek Orthodox faith, and opens it up to the guests to ask questions.

Greek Cooking Demonstration

The Greek Cooking Demonstration takes place in the basement of the new church along with the Silent Auction. The cooking demo walks through the preparation of Greek foods such as salads, dips and other finger foods.

Silent Auction

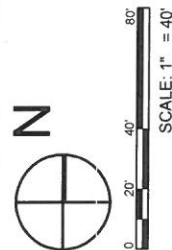
The Silent Auction takes place in the basement of the new church. Donations are given from local businesses, organizations and people from the community to be used as auction items.

Bounce House/ Photo Booth

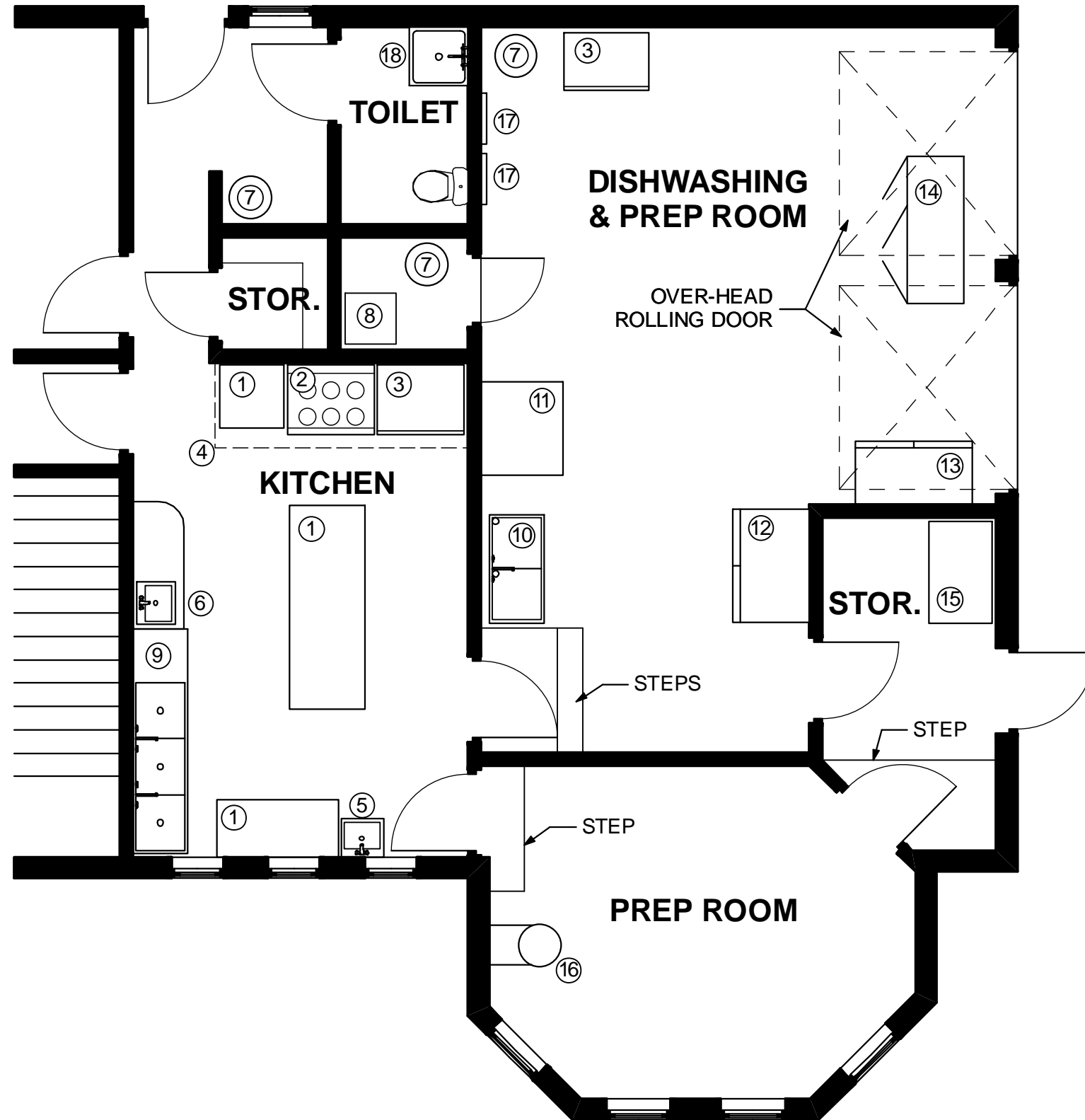
The Bounce House and Photo booth have a small use fee.

Raffle Booth

The Raffle booth hosts both the Raffle, the Car Raffle, the First Aid Station, the Lost Child Station and the Questions and Complaints department.

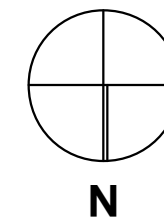


EGRESS, TRAFFIC, SAFETY CLEARANCES, & EVENT LAYOUT



KEY PLAN LEGEND

- ① STAINLESS STEEL TABLE
- ② 6-BURNER RANGE
- ③ DOUBLE OVEN
- ④ EXHAUST HOOD & FIRE SUPRESSION SYSTEM
- ⑤ HAND-WASHING SINK
- ⑥ VEGETABLE-RINSING SINK
- ⑦ HOT WATER HEATER
- ⑧ FURNACE
- ⑨ 3-COMPARTMENT SINK
- ⑩ 2-COMPARTMENT SINK
- ⑪ DISHWASHER
- ⑫ REFRIGERATOR
- ⑬ FREEZER
- ⑭ REFRIGERATOR CASE
- ⑮ CHEST FREEZER
- ⑯ MIXER
- ⑰ ELECTRICAL BREAKERS
- ⑱ MOP SINK



1 KITCHEN, PREP, & STORAGE AREA FLOOR PLAN

Post-Festival Clean Up Plan

Introduction

Before volunteers on Sunday night can leave, the festival must be cleaned up and put away. This is an essential part of the festival, and can be overlooked.

Cleanup Responsibility

There are several requirements for cleanup of the event. It is essential that the Booth Leads are responsible for properly scheduling volunteers for the cleanup requirements.

Clean Up Requirements

There are cleanup requirements for festival-wide Grounds, both booths, and activities.

Grounds Cleanup Requirements

The Booth Requirements are as follows:

- Remove all trash and take to dumpster
- Remove flagging
- Remove signs, and store for next year
- Store items that requires storage
- Inventory items and give documentation to Operations Director
- Submit use rate documentation to Quality Manager

Activity Cleanup Requirements

The Booth Requirements are as follows:

- Remove all trash and take to dumpster
- All leftover food put away, or given away
- All funds delivered to
- Put away equipment and left over supplies
- Take down any church owned tables and chairs
- Store items that requires storage
- Inventory items and give documentation to Operations Director
- Dishes must be washed and put away

Booth Cleanup Requirements

The Booth Requirements are as follows:

- Remove all trash and take to dumpster
- All leftover food put away, or given away
- Take down church owned tents
- Take down any church owned tables and chairs
- Inventory items and give documentation to Operations Director
- Store items that requires storage
- Put away equipment
- Dishes must be washed and put away

Money Count

The Money Counting office volunteers must stay until the money counting and security procedures are complete.

Alaska Greek Festival Inventory Template

[illegible]

Festival Closeout Plan

Administrative Closure

Administrative closure involves the preparation of administrative documentation, collection of project documentation, disposition of project documents, and logistics activities that ensure that the project resources are redistributed. Administrative closure includes, but is not limited to, task such as archiving, financial account closure, facilities turnover (or closure), contract closure, and personnel reassignment.

Event Closeout Checklist

The Event Closeout Checklist provides a vehicle to verify completion of the event clean up before beginning the close out phase. The transition checklist used at the closeout phase focuses on completion of event.

Checklist for Closing Festival					
DESCRIPTION	NEEDED?		REQUIRED DATE	RESPONSIBLE PERSON	NOTES
	YES	NO			
Clean up Festival Area					
Take out Trash/ Dumpster					
Wash and Store Dishes					
Take down tents					
Put Away all items					
Take Down Parking Flags					
Take down Signs					
Any Other Onsite Clean up					
Audit Final Changes					
Pay All Vendors					
Close out books/Audit					
Materials Inventoried and Returned to Storage					

Collecting Project Archive Data

Historic project data is an important source of information to help improve future projects. Typically, the following project data is archived:

- Project narrative
- Project Charter
- Project Plan
- Project management and oversight review records
- Correspondence
- Meeting Agenda/ Minutes
- Status reports
- Financial Documents
- Technical documents, files, program, tools, etc.,

All records should be stored in the Church's digital drop box.

Lessons Learned

Lessons learned are the documentation of the experience gained during a project. These lessons come from working with or solving real-world problems. Lessons learned document identified problems and how to solve them. Lessons learned are gathered to help eliminate the occurrence of the same problems in future projects.

- Statement of the Problem – Describe the problem that occurred. Provide sufficient detail to establish what happened.
- Discussion – Describe in detail the cause and impact of the problem.
- References – Provide any references used or other sources of information that may be helpful in understanding the problem or corrective actions.
- Corrective Actions – Identify what corrective actions were taken and discuss the results.

Lessons learned sessions are valuable closure and release mechanisms for team members, regardless of the project's success. The lessons learned session is typically a meeting or a series of meetings that may include the following:

- Project team
- Stakeholder representation—including external stakeholders
- Maintenance and operation staff

For a lessons learned session to be successful the problems encountered by the project team must be openly presented. It is important, however, that the problem discussions do not merely point a finger at some target other than the project team; responsibility and ownership for problem areas are critical to developing useful recommendations for future processes.

Process:

- Set meeting date in advance and announce to all volunteers to solicit feedback
- Set ground rules and timeline for discussion
- Find moderator who was not closely attached
- Appoint one person to take notes and type them up before the subcommittee's final meeting

Answer these questions:

1. Have the event objectives been achieved?
2. What went well?
3. What could be improved?
4. What had unintended consequences?
5. What would you do differently?
6. Any complaints from customers? Volunteers? Community members?
7. Did improvements work well? Did they illuminate problems?
8. Any major concerns or problems?
9. Recommendations for next year's festival?
10. Other comments?

Financial Close-out

Financial close-out is the process of completing and terminating the financial and budgetary aspects of the project. Financial closure includes both (external) contract closure and (internal) project account closure. All expenditures must be accounted for and reconciled with the account.

Contract Closure

Contract closure is the process of terminating contracts with external organizations or businesses. Contracts can be brought to closure for a variety of reasons, including contract completion, early termination, or failure to perform. It is a simple process, but close attention should be paid so that no room is left for liability of the agency.

In order to close a contract, it is important to collect all of the pertinent documentation for review. This will include all of the original contracts and supporting documentation such as schedules, contract changes, and performance reports.

A complete set of contractual records for the project in a safe and accessible place in case they need to be referenced at any point in the future.

Financial Closure

Financial closure is the process of completing all project-related financial transactions, finalizing and closing the project financial accounts, and disposing of project assets. It is a prerequisite to event closure. The event cannot be closed until all financial transactions are complete, otherwise there might not be the authority or funds to pay outstanding charges and invoices.

In advance, establish and announce, in writing, to all project staff and vendors the deadline date for the completion of all financial transactions and closing of financial accounts.

Process to assure financial close-out for event:

1. Verify that there are no outstanding invoices or unresolved financial obligations.
2. Close financial accounts according to applicable corporate, state and federal accounting procedures.
3. Comply with all applicable funding source requirements for records retention and financial reporting.
4. Notify your Chairperson that final payments have been processed for all project related contracts.
5. Transfer or dispose of assets according to the acquisition plan.
6. Save the financial records to the Digital Dropbox.

Financial closure establishes final event costs for comparison against budgeted costs as part of the close-out report. Finally, financial closure ensures proper disposition of all project assets.

Project Closeout Report

A Project Closeout Report documents the completion of closeout tasks and project performance. The report provides a historical summary of the projects deliverables and baseline activities over the course of the project. Additionally, the project closeout report identifies variances from the baseline plan, lessons learned, and disposition of project resources. The project closeout report is intended to provide a concise evaluation of the project.

The project manager typically has responsibility for preparing the report. The project manager gets input from the entire project team, the customers, and other major stakeholders. People performing different functions on the project will have different outlooks on the successes and failures of the project and on possible solutions.

Project Closeout Report Instructions and Template

- A. General Information** – Basic information that identifies the event.
- B. Performance Baseline** - Evaluate how the project performed against each of the performance goals established in the Charter.
- C. Cost (Budget) Baseline** - State the actual cost of the project and compare it to the planned cost baseline. Document and explain all cost and funding variances, including approved changes to the cost baseline.
- D. Scope** - Document any changes to the project scope and describe the impact of each change on performance, cost, or schedule baselines in the appropriate column.
- E. Lessons Learned** - Identify lessons learned for feedback to the Event Management process.
- F. Approval**

Project Closeout Report

A. General Information

Project Title: _____

Drafted by: Name _____

Prepared by: Date _____

B. Performance Baseline

Document how the project performed against each Performance Goal established in the Project Performance Plan.

Project Business Objective	<i>Performance Goal</i>	<i>Results</i>

C. Cost (Budget) Baseline

State the Planned Cost and Funding for the project, as approved in the Project Charter. State the Actual Cost and Funding at completion.

Expenditures (\$000)				
	<i>Planned</i>	<i>Actual</i>	<i>Variance</i>	<i>Explanation</i>
<i>Internal Staff Labor</i>				
<i>Contracts/ Services</i>				
<i>Rental/ Equipment</i>				
<i>Materials/ Supplies</i>				
<i>Other</i>				
<i>Contingency (Risk)</i>				
<i>Total</i>				

Funding (\$000)				
	Planned	Actual	Variance	Explanation
Revenue				
Other				
Total				

Total (\$000)				
	Planned	Actual	Variance	Explanation
Expenditures				
Revenue				
Total				

D. Project Documentation

Identify all project documentation materials stored in the project library or other repository. Identify the type of media used and the disposition of the project documentation (see Communications Plan).

[illegible]

E. Lessons Learned

Identify Lessons Learned for feedback to the event management process. Lessons Learned should be stated in terms of Problems (or issues) and Corrective Actions taken. Provide a brief discussion of the problem that identifies its nature, source, and impact. Site any references that provide additional detail. References may include project reports, plans, issue logs, change management documents, and general literature or guidance used that comes from another source.

<i>Statement of Problem</i>	<i>Discussion</i>	<i>References</i>	<i>Corrective Actions</i>

F. Approvals

<i>Position/Title</i>	<i>Signature/Printed Name/Title</i>	<i>Date</i>
<i>Chairperson</i>		
<i>Project Sponsor</i>		

''''''''''''''''R''''''''''**HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH**

Date xx/xx/xxxx

Donor name

Company name

Address

City, State Zipcode

RE: Thank you for supporting the 20xx GREEK FESTIVAL

Dear name of donor,

I would first like to thank you for all your support of the Greek Festival and our church. The 20xx event was one of our most successful festivals to date! Your generosity has made it possible to facilitate a wonderful cultural event that supports the building of our new church. The Greek Festival and our church would not be where it is today without you! We have been planning and are preparing for our event this year, but without the support of donors like you, we would not be able to host such a wonderful event.

Thank you for donating _____, valued at \$xxx,xxx.xx. We were able to raise funds to continue the building of our church/ support the children's Greek Dance/ other.

Your donations are tax deductible – our 501C (3) Tax ID is _____. Please keep this letter for your records.

Thank you,

First name Last name

Greek Festival

Chairperson

References

Templates for Greek Festival Best Practices Guide Sections and Documents

Charter: <http://www.projectmanagementdocs.com/> 12/24/15

Internal Controls Process:

<http://www.earthbookkeeping.com/QB%20tips/NPO%20Financial%20Policies%20template.doc>

1/28/16

Cost Management Plan: <http://www.projectmanagementdocs.com/> 1/28/16

Schedule Management Plan: <http://www.projectmanagementdocs.com/> 10/14/15

Risk Management Plan: <http://www.projectmanagementdocs.com/> 12/24/15

Risk Checklist: <http://www.projectmanagementdocs.com/> 12/24/15

Risk Registry Log:

http://www2a.cdc.gov/cdcup/library/templates/CDC_UP_Risk_Management_Log_Template.xls

2/16/16

Incident report process: <http://www.worksafenb.ca/docs/Sample-Procedure-for-Incident-Reporting.pdf> 3/14/16

Incident Template: <http://www.mtc.edu/about/pdfs/IncidentReportForm.pdf> 3/14/16

Health and Safety plan: <http://ehs.washington.edu/ohshsplans/index.shtm> 3/14/16

Stakeholder Management Plan: www.ProjectManagementDocs.com 8/24/15

Stakeholder Management Strategy: www.ProjectManagementDocs.com 8/24/15

Stakeholder Map: <http://www.projectmanagementdocs.com/> 2/16/16

Communications Plan: www.ProjectManagementDocs.com 12/24/15

Marketing Worksheet: <http://www.marketingdonut.co.uk/marketing/marketing-strategy/your-marketing-plan/marketing-plan-template> 3/14/16

HR Plan: www.ProjectManagementDocs.com 12/24/15

Process Improvement Plan: www.ProjectManagementDocs.com 12/24/15

Quality Management Plan: www.ProjectManagementDocs.com 12/24/15

Quality Metrics Plan: www.ProjectManagementDocs.com 12/24/15

Procurement Management Plan: www.ProjectManagementDocs.com 12/24/15

Change Management Plan: www.ProjectManagementDocs.com 12/24/15

Post-Implementation Review: www.ProjectManagementDocs.com 12/24/15

Project Health Checklist: www.ProjectManagementDocs.com 12/24/15

Closeout Guide: www.ProjectManagementDocs.com 12/24/15



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

2800 O'Malley Road, Anchorage, Alaska, 99507-4256 · Tel: (907) 344-0190 · Fax: (907) 344-9909

September 17, 2015

LuAnn Piccard
University of Alaska Anchorage
Masters of Science in Project Management
3211 Providence Drive
Anchorage, Alaska 99508

RE: Letter of Support for Allison Murrell

Dear Ms. Piccard,

The purpose of this letter is to show support for Allison Murrell's capstone project to create a best practices guide for the annual Greek Festival.

The Greek Festival is the annual fundraiser for the Holy Transfiguration Greek Orthodox Church. The festival is held every August, since 1995, on the church grounds. It is an event designed to raise funds for the new church building, and to provide the opportunity for the community to experience Greek culture and activities, acting as a catalyst for community inclusion and involvement.

We have been in need of a document that solidifies and clarifies the processes that go into hosting the annual event, and we are excited about working with Allison to build this guide which we hope will further enhance our festival.

Please feel free to contact us if you have any questions or concerns. My cell number is (907)764-1464.

Sincerely,

Angelic Menegatos Pournatzis
Greek Festival Chairperson

PROJECT MANAGEMENT PLAN
GREEK FESTIVAL ~~BEST PRACTICES GUIDE~~ EVENT MANAGEMENT PLAN
ALLISON MURRELL

2/17/201612/1/2015

Summary of Changes

Date	Change Detail	Signature
11/20/15	Changed Charter to Intro, edits and continuity errors corrected, Updated appendix	AM
12/1/15	Updated schedule	AM
<u>2/17/16</u>	<u>Changed project name</u>	<u>AM</u>

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PROJECT INTRODUCTION

Problem Objective

Every year, in late August, the Holy Transfiguration Greek Orthodox Church hosts the annual Alaska Greek Festival. The Parish Council, along with a chair person, organize, plan and execute the large multi-day event to raise funds for the building of the new church, to invite the community to experience some Greek culture.

There is a need to take the institutional knowledge from the Parish Council and the Chairperson, clarify that knowledge and place it in written documents to allow for the codification and assessment of previous festivals.

A ~~Best Practices Guide~~Event Management Plan should be created to facilitate the hosting of the annual event, to clarify the process of hosting the event, and to build a mechanism within the ~~Best Practices Guide~~Event Management Plan to create efficiencies and quality assurance metrics.

Project Outcomes

A ~~Best Practices guide~~Event Management Plan will be created for the Holy Transfiguration Greek Orthodox Church to help solidify the institutional knowledge of the planning and execution of the annual Alaska Greek Festival in order to clarify and organize the planning, execution and closing of the event.

Project Goals and Objectives

Project Goals include:

Clearly defining the processes involved in hosting the Alaska Greek Festival to enhance the experience of the festival for the volunteers, parish members and the community.

Project Objectives include:

Create a “Greek Festival ~~Best Practices Guide~~Event Management Plan” for use by the Holy Transfiguration Greek Orthodox Church in planning and executing their annual Greek Festival

Document the institutional knowledge of how to host event

Define clear set of operational standards for event

Define all processes involved in the planning, execution and close out for event

Define timeline of planning process for events

High Level Requirements

The objectives which mutually support the milestones and deliverables for this project have been identified. In order to be successful on this project we must:

- Be allowed access to previous festival documents and volunteers
- Stakeholders maintain positive support of project

Additional requirements may be added as necessary, with project sponsor approval, as the project moves forward.

Deliverables

The following deliverables must be met upon the successful completion of the Greek Festival ~~Best Practice Guide~~Event Management Plan Project:

- A ~~Best Practices Guide~~Event Management Plan tailored to the needs of the Greek Festival in and electronic format

Funding Authority

The funding authority for this project is Allison Murrell. As this is a research based project, there will be no funding made available.

Cost will be used to help track the Cost Performance Index (CPI) Key Performance Indicator (KPI). Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

All documents, including the final ~~Best Practice Guide~~Event Management Plan, will be sent electronically to prevent cost from being incurred.

Project Oversight Authority

The project advisory committee will be formed to oversee the project planning, execution and review of final deliverables.

They will have oversight and offer guidance on the project from accepting their role on the committee until the project is completed.

Acceptance Criteria

Acceptance criteria have been established for the Greek Festival Best Practices Project to ensure thorough vetting and successful completion of the project. The acceptance criteria are both qualitative and quantitative in nature. All acceptance criteria must be met in order to achieve success for this project:

1. Meet all deliverables within scheduled time and budget tolerances
2. Work with key stakeholders to create deliverable
3. Be completed before April 1st, 2016
4. Final document given to the Holy Transfiguration Greek Orthodox Church for their use in hosting the annual Greek Festival

SCOPE MANAGEMENT PLAN

Project Scope

This Project Scope Statement serves as a baseline document for defining the scope of the Greek Festival Best Practices Project, project deliverables, work which is needed to accomplish the deliverables, and ensuring a common understanding of the project's scope among all stakeholders. All project work should occur within the framework of the project scope statement and directly support the project deliverables. Any changes to the scope statement must be vetted through the approved Project Change Management Process prior to implementation. This completion date for this project is April 1st, 2016.

The Greek Festival Best Practices Project must include the following:

- Research of Alaska Greek Festival
- Research of Other Greek Festivals in the US
- Create a ~~Best Practices Guide~~Event Management Plan that will include the following:
 - Initiation approval process
 - Planning procedures
 - Schedule management plan including a timeline for planning
 - Financial management plan for festival funds
 - Procurement management process
 - Stakeholder management plan
 - Communication plan for both volunteers, stakeholders and community
 - HR/ Volunteer management plan
 - Risk management process
 - Quality management process
 - Change management process
 - Set up procedures, including layouts, installation and management best practices
 - Clean up procedures
 - Close out procedures

Copy of final ~~Best Practice guide~~Event Management Plan will be given to Festival Subcommittee and Festival Chairperson

Project Excludes:

- Researching other types of cultural festivals and fairs
- Managing the execution of the Greek Festival
- ~~Best practice guide~~Event Management Plan- does not have to be accepted or implemented by Festival Subcommittee or Chairperson

Critical Success Factors

The critical success factors will be:

- Meeting defined milestone deadlines
- Access is given to documents relating to previous festivals

Key Performance Indicators

Key Performance Indicators for this project include:

- % of milestones missed
 - o With a threshold not to exceed 34% of total milestones
- % of Overdue Project tasks
 - o With a threshold not to exceed 34% of total project tasks
- Schedule Performance Index (SPI)
 - o With a threshold not to fall below .95 and not to go above 1.1
- Cost Performance Index (CPI)
 - o With a threshold not to fall below .95 and not to go above 1.1

Constraints

Several constraints have been identified for the Greek Festival Best Practices Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified for the project:

1. Deliverable must be complete by April 1st, 2016
2. Project Scope can expand to include additional sections of the ~~Best Practices guide~~Event Management Plan to address the needs of stakeholders
3. Budget can be increased if approved by Project Manger

Assumptions

Several assumptions have been identified for the Greek Festival Best Practices Project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

1. Key stakeholder support and involvement in research portion of project
2. Low risk project → very limited risk management due to nature of research project

Project Risks

Risks that could affect the project are as follows;

Internal:

- Access to documents from previous festivals
- Cooperation of current and past volunteers

External:

- Ability to find information from other Greek Festivals

Greater detail and analysis will be documented in the Risk Registry and the Risk Management plan.

The Letter of Support detailing the support of the organization and a draft of the final is Greek Festival ~~Best Practice Guide~~ Event Management Plan Table of Contents located at Appendix B and C.

SCHEDULE MANAGEMENT PLAN

The project schedule is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the project team, sponsor, and stakeholders a picture of the project's status at any given time. The purpose of the schedule management plan is to define the approach the project team will use in creating the project schedule. This plan also includes how the team will monitor the project schedule and manage changes after the baseline schedule has been approved. This includes identifying, analyzing, documenting, prioritizing, approving or rejecting, and publishing all schedule-related changes.

Schedule Management Approach

Project schedules will be created using MS Project 2013 starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved, the project manager will approve and baseline the schedule.

The following will be designates as milestones for the project schedule:

Milestone/Deliverable	Target Date
Letter of support submitted	9/16/15
Initial research methods approved	10/2/15
PM Plan Draft submitted for review	11/6/15
PM Plan Approved/ Research Process Approved	11/20/15
Research Complete	1/7/16
Finalized Guide -Sections I-XIII	4/1/16
Final Presentation Presented	4/1/16

Milestone/Deliverable	Target Date
Final Best Practices Guide <u>Event Management Plan</u> Completed	4/1/16

Schedule Control

The project schedule will be reviewed and updated as necessary on a bi-weekly basis with actual start, actual finish, and completion percentages which will be provided by task owners.

The project manager is responsible for holding bi-weekly schedule updates/reviews; determining impacts of schedule variances; submitting schedule change requests; and reporting schedule status in accordance with the project's communications plan.

The project team is responsible for participating in bi-weekly schedule updates/reviews; communicating any changes to actual start/finish dates to the project manager; and participating in schedule variance resolution activities as needed.

Variance thresholds will be set at:
CPI less than 0.95 or greater than 1.1
SPI less than 0.95 or greater than 1.1

If the change is approved then it will be implemented by the Project Manager, who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Control Process.

The Project Schedule Baseline and Work Breakdown Structure are provided in Appendix D.

CHANGE MANAGEMENT PLAN

The Change Management Plan was created for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project in order to set expectations on how the approach to changes will be managed, what defines a change, the purpose and role of the change control board, and the overall change management process. All stakeholders will be expected to submit or request changes to the project in accordance with this Change Management Plan and all requests and submissions will follow the process detailed herein.

Change Management Approach

The Change Management approach for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will ensure that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of this project are approved and implemented.

The Change Management approach is not to be confused with the Change Management Process which will be detailed later in this plan. The Change Management approach consists of three areas:

- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

The Change Management process has been designed to ensure this approach is followed for all changes. By using this approach methodology, the Greek Festival ~~Best Practices Guide~~Event Management Plan Project Manager will prevent unnecessary change from occurring and focus its resources only on beneficial changes within the project scope.

Definitions of Change

There are several types of changes which may be requested and considered for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project. Depending on the extent and type of proposed changes, changes to the project documentation and the communication of these changes will be required to include any approved changes into the project plan and ensure all stakeholders are notified. Types of changes include:

- Scheduling Changes: changes which will impact the approved project schedule. These changes may require fast tracking, crashing, or re-baselining the schedule depending on the significance of the impact.
- Budget Changes: changes which will impact the approved project budget. These changes may require requesting additional funding, releasing funding which would no longer be required, or adding to project or management reserves. May require changes to the cost baseline.
- Scope Changes: changes which are necessary and impact the project's scope which may be the result of unforeseen requirements which were not initially planned for. These changes may also impact budget and schedule. These changes may require revision to WBS, project scope statement, and other project documentation as necessary.

The project manager must ensure that any approved changes are communicated to the project stakeholders. Additionally, as changes are approved, the project manager must ensure that the changes are captured in the project documentation where necessary. These document updates must then be communicated to the project team and stakeholders as well.

Roles and Responsibilities

The following are the roles and responsibilities for all change management efforts related to the Greek Festival ~~Best Practices Guide~~Event Management Plan Project:

Project Manager:

- Approve all changes to budget/funding allocations
- Approve all changes to schedule baseline
- Approve any changes in project scope

- Receive and log all change requests from project stakeholders
- Conduct preliminary risk, cost, schedule, scope analysis of change
- Seek clarification from change requestors on any open issues or concerns
- Make documentation revisions/edits as necessary for all approved changes

Change Control Process

The Change Control Process for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will follow the organizational standard change process for all projects. The project manager has overall responsibility for executing the change management process for each change request.

- 1) Identify the need for a change – Change requestor will submit a completed change request form to the project manager.
- 2) Project Manager will log change in the change request register– The project manager will keep a log of all submitted change requests throughout the project’s lifecycle.
- 3) Evaluate the change– The project manager will analyze the impact of the change to risk, cost, schedule, and scope and seek clarification from team members and the change requestor.
- 4) Decision on change request– The project manager will decide whether or not it will be approved based on all submitted information.
- 5) Implement change– If a change is approved the project manager will update and re-baseline project documentation as necessary.

Change Form and Change Log are located in Appendix F.

COMMUNICATIONS MANAGEMENT PLAN

The purpose of the Communications Management Plan is to define the communication requirements for the project and how information will be distributed. The Communications Management Plan defines the following:

- What information will be communicated—to include the level of detail and format
- How the information will be communicated—in meetings, email, telephone, web portal, etc.
- When information will be distributed—the frequency of project communications both formal and informal
- Who is responsible for communicating project information
- Communication requirements for all project stakeholders
- What resources the project allocates for communication
- How changes in communication or the communication process are managed
- The flow of project communications
- Any constraints, internal or external, which affect project communications
- Any standard templates, formats, or documents the project must use for communicating
- An escalation process for resolving any communication-based conflicts or issues

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project's Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

COST MANAGEMENT PLAN

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project. During the monthly project status meeting, the Project Manager will meet to present and review the project's cost performance for the preceding month. Performance will be measured using earned value. The Project Manager is responsible for accounting for cost deviations.

There are no costs for this project. Cost will be used to help track metrics on the Key Performance Index (KPI). Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

Cost Management Approach

Costs for this project will be managed at the fourth level of the Work Breakdown Structure (WBS). Control Accounts (CA) will be created at this level to track costs. Earned Value calculations for the CA's will measure and manage the financial performance of the project. Although activity cost estimates are detailed in the work packages, the level of accuracy for cost management is at the fourth level of the WBS.

Cost variances of +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to cautionary; as such, those values will be changed to yellow in the project status reports.

Cost variances of +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to an alert stage; as such, those values will be changed to red in the project status reports. This will require corrective action from the Project Manager in order to bring the cost and/or schedule performance indexes below the alert level.

Corrective actions will require a project change request and be must approved by the Project Sponsor before it can become within the scope of the project.

Measuring Project Costs

Performance of the project will be measured using Earned Value Management. The following four Earned Value metrics will be used to measure to projects cost performance:

- Schedule Variance (SV)
- Cost Variance (CV)
- Schedule Performance Index (SPI)
- Cost Performance Index (CPI)

If the Schedule Performance Index or Cost Performance Index has a variance of between 0.1 and 0.2 the Project Manager must report the reason for the exception. If the SPI or CPI has a variance of greater than 0.2 the Project Manager must report the reason for the exception and provide management a detailed corrective plan to bring the projects performance back to acceptable levels.

Performance Measure	Yellow	Red
Schedule Performance Index (SPI)	Between 0.95 and Between 1.1 and 1.2	Less Than 0.95 or Greater than 1.2
Cost Performance Index (CPI)	Between 0.95 and Between 1.1 and 1.2	Less Than 0.95 or Greater than 1.2

Reporting Format

Reporting for cost management will be included in the monthly project status report. This section will contain the Earned Value Metrics identified in the previous section. All cost variances outside of the thresholds identified in this Cost Management Plan will be reported on including any corrective actions which are planned. Change Requests which are triggered based upon project cost overruns will be identified and tracked in this report.

Cost Variance Response Process

The Control Thresholds for this project is a CPI or SPI of less than 0.8 or greater than 1.2. If the project reaches one of these Control Thresholds, a Cost Variance Corrective Action Plan is required. The Project Manager will present options for corrective actions within five business days from when the cost variance is first reported. Within three business days from when the Project Manager selects a corrective action option, and will create a formal Cost Variance Corrective Action Plan. The Cost Variance Corrective Action Plan will detail the actions necessary to bring the project back within budget and the means by which the effectiveness of the actions in the plan will be measured.

Cost Change Control Process

The cost change control process will follow the established project change request process. Approvals for project budget/cost changes must be approved by the project sponsor.

PROCUREMENT MANAGEMENT PLAN

This Procurement Management Plan sets the procurement framework for this project. This will serve as a guide for managing procurement throughout the life of the project and will be updated as acquisition needs change.

Procurement Management Approach

The Project Manager will provide oversight and management for all procurement activities under this project. The Project Manager will work with the project team to identify all items to be procured for the successful completion of the project.

Procurement Definition

The following procurement items and/or services have been determined to be essential for project completion and success. The following list of items/services, justification, and timeline:

There are no purchases for this project

The following individuals are authorized to approve purchases for the project, should the need arise:

<u>Name</u>	<u>Role</u>
Allison Murrell	Project Manager

Decision Criteria

While this project requires no procurement, in the event procurement is required, the Project Manager will work with the project team to identify all items or services to be procured for the successful completion of the project

In the event a procurement becomes necessary, the Project Manager will be responsible for management any selected vendor or external resource. The Project Manager will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the purchasing and contracts groups.

STAKEHOLDER MANAGEMENT PLAN

The Stakeholder Management Strategy for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will be used to identify and classify project stakeholders; determine stakeholder power, interest, and influence; and analyze the management approach and communication methodology for project stakeholders. This will allow us to identify key influential stakeholders to solicit input for project planning and gain support as the project progresses. This will benefit the project by minimizing the likelihood of encountering competing objectives and maximizing the resources required to complete the project.

Early identification and communication with stakeholders is imperative to ensure the success of the Greek Festival ~~Best Practices Guide~~Event Management Plan Project by gaining support and input for the project. Some stakeholders may have interests which may be positively or negatively affected by the Greek Festival ~~Best Practices Guide~~Event Management Plan Project. By initiating early and frequent communication and stakeholder management, we can more effectively manage and balance these interests while accomplishing all project tasks.

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project's Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project's communication channels and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project's Stakeholder Register and use this, along with the project communication matrix as the basis for all communications. The Project Manager will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Monthly Status Report	Email summary of project status	Monthly	Email	Project Manager, Team	Status Report	Project Manager
Bi-weekly Project Meeting	Meeting to review action register and status	Bi-Weekly	In Person/ Email	Project Manager, Project Team	Updated Action Register	Project Manager
Project Monthly Review (PMR)	Present metrics and status to team and sponsor	Monthly	In Person	Project Manager, Team, and Class	Status and Metric Presentation	Project Manager
Project Gate Reviews	Present closeout of project phases and kickoff next phase	As Needed	In Person	Project Manager, Team	Phase completion report and phase kickoff	Project Manager

Project team directory for all communications is:

Name	Title	E mail	Office Phone	Cell Phone
Project Manager	Allison Murrell	ammurrell@uaa.alaska.edu	317-3198	
Primary Advisor	LuAnn Piccard	lpiccard2@uaa.alaska.edu	786-1924	
Committee Advisor	Roger Hull	rkhull@uaa.alaska.edu	786-1924	
Committee Advisor	Seong Dae Kim	sdkim2@uaa.alaska.edu	786-1924	

Communications Conduct

Meetings

During all project meetings, the timekeeper will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive to each meeting on time and all cell phones and blackberries should be turned off or set to vibrate mode to minimize distractions.

Email

All email pertaining to the Project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. All attachments should be submitted through the collaboration area on Blackboard. If the email is to bring an issue forward then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue.

Informal Communications

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager so the appropriate action may be taken.

Identifying Stakeholders

The following criteria will be used to determine if an individual will be included as a stakeholder:

- 1) Will the person or their organization be directly or indirectly affected by this project?
- 2) Does the person or their organization hold a position from which they can influence the project?
- 3) Does the person have an impact on the project's resources (material, personnel, funding)?
- 4) Does the person or their organization have any special skills or capabilities the project will require?
- 5) Does the person potentially benefit from the project or are they in a position to resist this change?

Any individual who meets one or more of the above criteria will be identified as a stakeholder. Stakeholders from the same organization will be grouped in order to simplify communication and stakeholder management.

Key Stakeholders

As a follow on to Identify Stakeholders, the project team will identify key stakeholders who have the most influence on the project or who may be affected the most by it. These key stakeholders are those who also require the most communication and management which will be determined as stakeholders are analyzed. Once identified, the Project Manager will develop a plan to obtain their feedback on the level of participation they desire, frequency and type of communication, and any concerns or conflicting interests they have.

Based on the feedback gathered by the project manager, the determination may be made to involve key stakeholders on steering committees, focus groups, gate reviews, or other project meetings or milestones. Thorough communication with key stakeholders is necessary to ensure all concerns are identified and addressed and that resources for the project remain available.

Stakeholder Analysis

Once all Greek Festival ~~Best Practices Guide~~Event Management Plan Project stakeholders have been identified, the project team will categorize and analyze each stakeholder. The purpose of this analysis is to determine the stakeholders' level of power or influence, plan the management approach for each stakeholder, and to determine the appropriate levels of communication and participation each stakeholder will have on the project.

Once all stakeholders have been identified, the project team will utilize a power/interest matrix to illustrate the potential impact each stakeholder may have on the project. Based on this analysis the project team will also complete a stakeholder analysis matrix which illustrates the concerns, level of involvement, and management strategy for each stakeholder.

The chart below will be used to establish key stakeholders and their levels of power and interest for use on the power/interest chart as part of the stakeholder analysis located in the Stakeholder Registry worksheet.

Key	Organization	Name	Interests (1-5)	Power (1-5)
1	Allison Murrell	PM	4	4
2	Angelic Pournatzis	Chairperson	4	4
3	Bill Copadis	President Parish Council	2	2
4	Father Vasili	Priest	3	2
5	Committee	Advisers	4	4
6	Parish	Church members/ Greeks	1	2

Detailed Stakeholder Registry and Analysis is located at Appendix G.

QUALITY MANAGEMENT PLAN

The Quality Management Plan for the Greek Festival ~~Best Practices Guide~~Event Management Plan project will establish the activities, processes, and procedures for ensuring a quality product upon the conclusion of the project. The purpose of this plan is to:

- Ensure quality is planned
- Define how quality will be managed
- Define quality assurance activities
- Define quality control activities
- Define acceptable quality standards

Quality Management Approach

The quality management approach for the Greek Festival ~~Best Practices Guide~~Event Management Plan project will ensure quality is planned for both the product and processes. In order to be successful, this project will meet its quality objectives by utilizing an integrated quality approach to define quality standards, measure quality and continuously improve quality.

Process quality for the project will focus on the processes by which the project deliverable will be manufactured. Establishing process quality standards will ensure that all activities conform to an organizational standard which results in the successful delivery of the product.

Metrics will be established and used to measure quality throughout the project life cycle for the product and processes. The Project Manager will be responsible for working with the project team to define these metrics, conduct measurements, and analyze results. These product and process measurements will be used as one criterion in determining the success of the project and must be reviewed by the project sponsor. Metrics will include:

Methods for measuring project progress

- % of milestones missed
 - o With a threshold not to exceed 34% of total milestones
- % of Overdue Project tasks
 - o With a threshold not to exceed 34% of total project tasks
- Schedule Performance Index (SPI)
 - o $SPI = \text{Earned Value} / \text{Planned Value}$
 - o SPI will be calculated monthly and issued with status reports and be presented at PM 686A classes
 - o With a threshold not to fall below .95 or exceed 1.1
- Cost Performance Index (CPI)
 - o $CPI = \text{Earned Value} / \text{Actual Cost}$
 - o CPI will be calculated monthly and issued with status reports and be presented at PM 686A classes
 - o With a threshold not to fall below .95 or exceed 1.1

If thresholds are breached, work will stop on project until an action plan can be created and implemented to address the issue. The change process will be used to assess any changes to the project scope, cost or schedule.

Quality Requirements / Standards

Process Quality

The process quality standards and requirements will be determined by the Project Manager. The Greek Festival ~~Best Practices Guide~~Event Management Plan project team will work to establish acceptable standards and document these standards for incorporation into the Greek Festival ~~Best Practices Guide~~Event Management Plan project plan. These standards will be communicated to all project stakeholders.

Quality will be assessed by committee. Documents will be submitted to committee and committee will assess and give comment to Project manager on the, who will then update the documents to create better a quality product.

Quality Assurance

The quality assurance of the Greek Festival ~~Best Practices Guide~~Event Management Plan project focuses on the processes used in the manufacturing of the ~~best practices guide~~Event Management Plan. In order to ensure quality, an iterative quality process will be used throughout the project life cycle. This iterative process includes measuring process metrics, analyzing process data, and continuously improving the processes.

The Project Manager will perform assessments at planned intervals throughout the project to ensure all processes are being correctly implemented and executed.

Process improvement is another aspect of quality assurance. Quality assurance reviews, findings, and assessments should always result in some form of process improvement. All process improvement efforts must be documented, implemented, and communicated to all stakeholders as changes are made.

Quality Control

The quality control of the Greek Festival ~~Best Practices Guide~~Event Management Plan project focuses primarily on the product and the acceptable standards and performance.

The Project Manager will schedule regularly occurring project, management, and document reviews. In these reviews, the project team members are encouraged to provide feedback to the Project Manager to improve the quality of the product being produced. By doing so, the project team will ensure that the product achieves a high level of professionalism and thoroughness.

Approved research plan and application of knowledge areas are located in Appendix H.

RISK MANAGEMENT PLAN

The purpose of the risk management plan is to establish the framework in which the project team will identify risks and develop strategies to mitigate or avoid those risks. However, before risks can be identified and managed, there are preliminary project elements which must be completed. These elements are outlined in the risk management approach.

This project is considered a low risk project as it is a research project.

Top Three Risks

The top three high probability and high impact risks to this project are:

- Lack of access to research documents
- Lack of online resources for research
- Lose positive support of Stakeholders

Risk Management Approach

The approach we have taken to manage risks for this project included a methodical process by which the project team identified, scored, and ranked the various risks. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk's planned timeframe. Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

Risk Identification

For this project, risk identification was conducted by the Project Manager during the indication phase of the project. Risks were defined as low, due to the research nature of the project. Risks will still be defined, assessed and managed.

Risk Qualification and Prioritization

In order to determine the severity of the risks identified by the team, a probability and impact factor was assigned to each risk. This process allowed the project manager to prioritize risks based upon the effect they may have on the project. The project manager utilized a probability-impact matrix to facilitate the team in moving each risk to the appropriate place on the chart.

Once the risks were assigned a probability and impact and placed in the appropriate position on the chart, the recorder captured the finished product and the project manager moved the process on to the next step: risk mitigation/avoidance planning.

Risk Monitoring

The most likely and greatest impact risks have been added to the project plan to ensure that they are monitored during the time the project is exposed to each risk. At the appropriate time in the project schedule a Risk Manager is assigned to each risk. Risk monitoring will be a continuous process throughout the life of this project. As risks approach on the project schedule the project manager will ensure that the appropriate risk manager provides the necessary status updates which include the risk status, identification of trigger conditions, and the documentation of the results of the risk response.

Risk Mitigation and Avoidance

The project manager has led the project team in developing responses to each identified risk. As more risks are identified, they will be qualified and the team will develop avoidance and mitigation strategies. These risks will also be added to the Risk Register and the project plan to ensure they are monitored at the appropriate times and are responded to accordingly.

The risks for this project will be managed and controlled within the constraints of time, scope, and cost. All identified risks will be evaluated in order to determine how they affect this triple constraint. The project manager, with the assistance of the project team, will determine the best way to respond to each risk to ensure compliance with these constraints.

In extreme cases it may be necessary to allow flexibility to one of the project's constraints. Only one of the constraints for this project allows for flexibility as a last resort. If necessary, funding may be added to the project to allow for more resources in order to meet the time (schedule) and scope constraints. Time and scope are firm constraints and allow for no flexibility. Again, the cost constraint is flexible only in extreme cases where no other risk avoidance or mitigation strategy will work.

Risk Register

The Risk Register for this project is a log of all identified risks, their probability and impact to the project, the category they belong to, mitigation strategy, and when the risk will occur. The register was created through the initial project risk management meeting led by the project manager. During this meeting, the project team identified and categorized each risk. Additionally, the team assigned each risk a score based on the probability of it occurring and the impact it could potentially have. The Risk Register also contains the mitigation strategy for each risk as well as when the risk is likely to occur.

Based on the identified risks and timeframes in the risk register, each risk has been added to the project plan. At the appropriate time in the plan—prior to when the risk is most likely to occur—the project manager will assign a risk manager to ensure adherence to the agreed upon mitigation strategy. The each risk manager will provide the status of their assigned risk at the bi-weekly project team meeting for their risk’s planned timeframe.

The Risk Register and Lessons Learned for this project are located at Appendix I.

HUMAN RESOURCES MANAGEMENT PLAN

Human resources management is an important part of the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project. The human resources management plan is a tool which will aid in the management of this project’s human resource activities throughout the project until closure. The human resources management plan includes:

- Roles and responsibilities of team members throughout the project
- Project organization charts

The purpose of the human resources management plan is to achieve project success by ensuring the appropriate human resources are acquired with the necessary skills, resources are trained if any gaps in skills are identified, team building strategies are clearly defines, and team activities are effectively managed.

Roles and Responsibilities

The roles and responsibilities for the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project are essential to project success. All team members must clearly understand their roles and responsibilities in order to successfully perform their portion of the project. For the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project the following project team roles and responsibilities have been established:

Project Manager (PM), (1 position): Be the primary resource for this project. Will create and manage all documentation need to complete this project. Will submit documents according to the Committee Submittal Review Schedule and meet all other dates and deadline required to complete the project. Will fulfill role as “Student” in the Expectations for PM 686A/B Capstone Project advising. Will be responsible for executing PM Project plan and any other tasks as needed to complete the project and the capstone classes.

Primary Advisor (1 positions): Be the primary adviser for the Project Manager to help create a strong PM plan and a comprehensive deliverable for the project. Will coordinate input for other committee members for PPM deliverables and final project deliverables. Will analyze and assess administrative go/no go phase gates. Will assign final grade for project. Will provide feedback on submitted documents in a timely fashion, as laid out in the calendar.

Committee Members (2 positions): Will provide feedback on submitted documents in a timely fashion, as laid out in the calendar. Will attend final presentation, for both 686A and 686B. Will add value to the overall project through their input and knowledge.

RACI Charts

The RACI (Responsible/ Accountable/ Consulted/ Informed) chart shows the relationship between project tasks and team members. Any proposed changes to project responsibilities must be reviewed and approved by the project manager. Changes will be proposed in accordance with the project's change control process. As changes are made all project documents will be updated and redistributed accordingly.

The Project Committee Submission Review schedule shows the relationship between project tasks and the submittal schedule. Any proposed changes to this must be reviewed and approved by the project manager. Changes will be proposed in accordance with the project's change control process. As changes are made all project documents will be updated and redistributed accordingly.

Staff Acquisition

For the Greek Festival ~~Best Practices Guide~~Event Management Plan Project the project staff will consist entirely of internal department resources. There will be no outsourcing/contracting performed within the scope of this project.

Advisors will be asked to participate. 30 days' notice will be given by advisers who would like to be removed from this project so the Project Manager has time to find a replacement.

Resource Calendar

The Greek Festival ~~Best Practices Guide~~Event Management Plan Project will last for two semesters. All resources are required before the project can begin.

A calendar will be issued that will include deadlines for the Project Manager and the committee for work packages to be completed.

The calendar will include submittal deadlines, committee review comments deadline, PPM deadlines, and important dates and deadlines for UAA/ PM Department. The calendar can be updated as needed without going through the formal change management process.

Resource Calendar, Committee Submittal spreadsheet, Signed Committee Expectations Contract and the RACI Chart can be found at Appendix J.

APPENDIX

- A- Project Charter
- B- Letter of Support
- C- Greek Festival ~~Best Practices Guide~~Event Management Plan Table of Contents and Final report outline
- D- Project Schedule/ Work Breakdown Structure
- E- Communication Matrix
- F- Change Form and Change Log
- G- Stakeholder Registry and Analysis
- H- Approved Research Plan/ Knowledge Areas
- I- Risk Registry/ Lessons Learned Narrative
- J- Resource Calendar/ Committee Expectations /Committee Submission Schedule/ Requirement Tractability Matrix
- K- Status reports

PROJECT CHARTER

Greek Festival Best Practices Guide

VERSION: 2

REVISION DATE: 11/20/2015

Approval of the Project Charter indicates an understanding of the purpose and content described in this document. By signing this document, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Allison Murrell	PM		11/20/15

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1.2 Project Outcomes.....	1
1.3 Project Goals and Objectives.....	1
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1.5 Critical Success Factors	2
1.6 Key Performance Indicators.....	2
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Section 1. Project Overview

1.1 Problem Objective

Every year, in late August, the Holy Transfiguration Greek Orthodox Church hosts the annual Alaska Greek Festival. The Parish Council, along with a chair person, organize, plan and execute the large multi-day event to raise funds for the building of the new church, to invite the community to experience some Greek culture.

There is a need to take the institutional knowledge from the Parish Council and the Chairperson, clarify that knowledge and place it in a written documents to allow for the codification and assessment of pervious festivals.

A best practices guide should be created to facilitate the hosting of the annual event, to clarify the process of hosting the event and to build a mechanism within the best practices guide to create efficiencies and quality assurance metrics.

1.2 Project Outcomes

A Best Practices guide will be created for the Holy Transfiguration Greek Orthodox Church to help solidify the institutional knowledge of the planning and execution of the annual Alaska Greek Festival in order to clarify and organize the planning, execution and closing of the event.

1.3 Project Goals and Objectives

Project Goals include:

- Clearly defining how to host the Alaska Greek Festival to enhance the experience of the festival for the volunteers, parish members and the community.

Project Objectives include:

- Create a "Greek Festival Best Practices Guide" for use by the Holy Transfiguration Greek Orthodox Church in planning and executing their annual Greek Festival

- Document the institutional knowledge of how to host event

- Instill a clear set of operational standards for event

- Clearly define all processes involved in the planning, execution and close out for event

- Define timeline of planning process for events

1.4 Project Scope

The scope for this project will be limited to researching Greek festivals and the creation of the best practices guide.

Project Includes:

Research of Alaska Greek Festival

Research of Other Greek Festivals in the US

- Specifically Chicago and California festivals of like size

Create a Best Practices guide that will include the following:

- Initiation approval process
- Planning procedures
- Schedule management plan including a timeline for planning
- Financial management plan for festival funds
- Procurement management process
- Stakeholder management plan
- Communication plan for both volunteers, stakeholders and community
- HR/ Volunteer management plan
- Risk management process
- Quality management process
- Change management process
- Set up procedures, including layouts, installation and management best practices
- Clean up procedures
- Close out procedures

Copy of final Best Practice guide will be given to and Festival Chairperson in an electronic format

Project Excludes:

Researching other types of cultural festivals and fairs

Managing the execution of the Greek Festival

Best practice guide does not have to be accepted or implemented by Parish Council or Chairperson

1.5 Critical Success Factors

The critical success factors will be:

Meeting defined milestone deadlines

Access is given to documents relating to previous festivals

1.6 Key Performance Indicators

Key Performance Indicators for this project include:

% of milestones missed

With a threshold not to exceed 34% of total milestones

% of Overdue Project tasks

With a threshold not to exceed 34% of total project tasks

Schedule Performance Index

With a threshold not to fall below .95

1.6 Assumptions

Several assumptions have been identified for the Greek Festival Best Practices Project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

1. Key stakeholder support and involvement in research portion of project
2. Low risk project □ very limited risk management due to nature of research project

1.7 Constraints

Several constraints have been identified for the Greek Festival Best Practices Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified for the project:

1. Deliverable must be complete by April 1st, 2016
2. Project Scope can expand to include additional sections of the Best Practices guide to address the needs of stakeholders
3. Budget can be increased if approved by Project Manager

1.8 Project Risks

Risks that could affect the project are as follows;

Internal:

Access to documents from previous festivals

Cooperation of current and past volunteers

External:

Ability to find information from other Greek Festivals

Greater detail and analysis will be documented in the Risk Registry and the Risk Management plan.

Section 2. Project Authority and Milestones

2.1 Funding Authority

The funding authority for this project is Allison Murrell. As this is a research based project there will be no funding made available.

Cost will be used to help track KPI's. Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

All documents, including the Final Best Practice Guide, will be sent electronically to prevent cost from being incurred.

2.2 Project Oversight Authority

The project advisory committee will be formed to oversee the project planning, execution and review of final deliverables.

They will have oversight and offer guidance on the project from accepting their role on the committee till the project is completed.

2.3 Major Project Milestones

The chart below lists the major milestones for the Greek Festival Best Practices Guide Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project schedule and the Work Breakdown Structure (WBS). If there are any scheduling delays which may affect a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

Milestone/Deliverable	Target Date
Letter of support submitted	9/16/15
Initial research methods approved	10/2/15
IRB Approval	10/23/15
PM Plan Draft submitted for review	11/6/15
PM Plan Approved/ Research Process Approved	11/20/15
Research Complete	1/7/16
Guide Sections I-XIII Drafted	3/31/16
Final Presentation Presented	4/18/16
Final Best Practices Guide Completed	4/18/16

Section 3. Points of Contact

Identify and provide contact information for the primary and secondary contacts for the project.

Role	Name/Title/Organization	Phone	Email
Project Manager	Allison Murrell	317-3198	ammurrell@uaa.alaska.edu
Primary Advisor	LuAnn Piccard	786-1924	lpiccard2@uaa.alaska.edu
Committee Advisor	Roger Hull	786-1924	rk Hull@uaa.alaska.edu
Committee Advisor	Seong Dae Kim	786-1924	sdkim2@uaa.alaska.edu

Section 4. Revision History

Identify document changes.

Version	Date	Name	Description
1	9/11/15	Original	Original Charter



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

2800 O'Malley Road, Anchorage, Alaska, 99507-4256 · Tel: (907) 344-0190 · Fax: (907) 344-9909

September 17, 2015

LuAnn Piccard
University of Alaska Anchorage
Masters of Science in Project Management
3211 Providence Drive
Anchorage, Alaska 99508

RE: Letter of Support for Allison Murrell

Dear Ms. Piccard,

The purpose of this letter is to show support for Allison Murrell's capstone project to create a best practices guide for the annual Greek Festival.

The Greek Festival is the annual fundraiser for the Holy Transfiguration Greek Orthodox Church. The festival is held every August, since 1995, on the church grounds. It is an event designed to raise funds for the new church building, and to provide the opportunity for the community to experience Greek culture and activities, acting as a catalyst for community inclusion and involvement.

We have been in need of a document that solidifies and clarifies the processes that go into hosting the annual event, and we are excited about working with Allison to build this guide which we hope will further enhance our festival.



















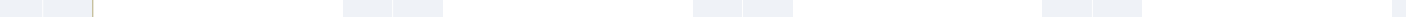

















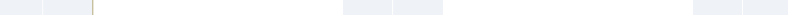















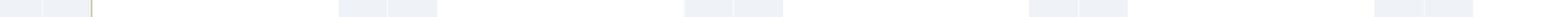











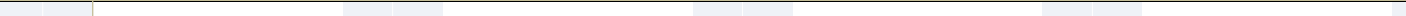















Please feel free to contact us if you have any questions or concerns. My cell number is (907)764-1464.

Sincerely,

Angelic Menegatos Pournatzis
Greek Festival Chairperson

























[illegible]

Critical		Split		Finish-only		Baseline Milestone		Manual Summary		Inactive Task	
Critical Split		Task Progress		Duration-only		Milestone		Project Summary		Inactive Milestone	
Critical Progress		Manual Task		Baseline		Summary Progress		External Tasks		Inactive Summary	
Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

ID		Task Mode	WBS	Task Name	Duration	Cost	Start	Finish	Jan 31, '16							Feb 7, '16							Feb 14, '16							Feb 21, '16							Feb 28, '16			
									S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
1			1	Capstone	154 days	\$2,445.00	Tue 9/1/15	Fri 4/1/16																																
2			1.1	PM 686A	65 days	\$893.00	Tue 9/1/15	Mon 11/30/15																																
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108			1.2.3.10	Deliverable #4	11 days	\$64.00	Thu 3/3/16	Thu 3/17/16																																
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118			1.2.3.12	Finalize guide	1 day	\$8.00	Fri 4/1/16	Fri 4/1/16																																
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ID		Task Mode	WBS	Task Name	Duration	Cost	Start	Finish					Mar 6, '16				Mar 13, '16				Mar 20, '16				Mar 27, '16												
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Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

Change Control Log

[illegible]

Change Request Form

Changes are an inevitable part of projects. While changes can be disruptive, they are far better than to deliver the wrong thing! This simple change request also turns into an analysis sheet once it is submitted.

Name of Project:	Greek Festival Practices Guide		
Name of Requestor:	Allison Murrell		
Summary of Request			
Replace "California and Chicago Greek festivals" with "US and Canada" in research			
Reason for Request			
Get better data that is more generalized, but could be used later to find similar festivals, based on size, cost, revenue, program, etc.			
Impact of Change			
Will increase the academic level of research. Take from very broad general knowledge to large data pool.			
Project Team Use Only			
Change Request ID	001	Assigned To: AM	
Analysis Due	26/01/2016	Support Resources	N/A
Analysis Summary			
Good Plan. Better to have a shallow and wide pool than a narrow and shallow pool.			
Recommended Action	Approve	Project Manager	Allison Murrell
PM Decision	Approve	Date	26/01/2016
Requestor Advised	26/01/2016	Project Plan Updated	29/01/2016

Guidelines:

- **Name of Project:** The project for which the change is being requested
- **Name of Requestor:** The person who is asking for the change to be made
- **Summary of Request:** The description of the request that is being asked for. This should be as detailed as necessary to allow the project team to understand exactly what is being requested. It should clarify any of the following that apply:
 - Scope changes
 - Schedule changes
 - Budget changes
 - Quality standard changes
 - Risk tolerance changes
 - Specific resource changes
- **Reason for Request:** The background and explanation to the request. This should explain why the request is important to the project and should highlight the benefits that will be gained by incorporating the change into the initiative. In conjunction with the next field (Impact if Change is Not Made), it will provide the logic for the request being made
- **Impact if Change is Not Made:** The repercussions for the project if the change is not approved. This should be a realistic assessment and should focus on challenges with the project's ability to meet its goals; ultimately, the decision on whether to approve or reject will (at least in part) come down to the costs identified here versus the costs of making the change. This field combines with the previous field (Reason for Request) to provide the logic for the request being made.

The remaining fields are for the use of the project team in assessing the request:

- **Change Request ID:** The request should be logged in a change log and a unique identifier assigned that will assist with tracking. All documentation associated with the change should carry this ID.
- **Assigned To:** The person assigned to carry out or to lead the analysis. This person should be viewed as the change request owner and should be the person who has the greatest understanding of the area(s) of the project that are impacted and the extent of that impact. See also Support Resources below.
- **Analysis Due:** The date by which the owner/person that the analysis is assigned to needs to have completed their analysis and provided a recommendation to the project manager for submission to the change control board. This date should be determined by the owner and project manager in partnership and should reflect the unique circumstances of each change; arbitrary timelines will not be successful.
- **Support Resources:** Additional team members and/or stakeholders who will assist the change owner in conducting the analysis. These may not be required for every change, but for more complex requests these individuals will be invaluable. Individuals should be identified rather than teams to drive accountability.
- **Analysis Summary:** The summary of the work carried out by the owner and any support resources. This should focus on the impact of the change to the project constraints (including quality and risk) and should also reflect areas of uncertainty where the impact may be larger than has been able to assess accurately within the analysis period. This area should also consider the impact to the deliverables if the change is not approved.
- **Recommended Action:** This is the recommendation of the change owner.
- **Project Manager:** The PM should put their name to the recommended action to indicate that they have discussed the change with the owner after the analysis has been completed; they are in agreement with the recommendation that is going to the change control board.
- **Change Board Decision:** The decision reached by the change control board or equivalent governance function after reviewing the request and analysis.
- **Change Board Date:** The date that the change control board decision is made.
- **Requestor Advised:** The date that the person requesting the change is advised of the change control board decision. This is the accountability of the project manager although they may delegate responsibility to a member of the team (commonly the team's change owner).
- **Project Plan Updated:** The date when all of the changes to the project plan have been made (if necessary) after the change control board's decision. This is the accountability of the project manager.

Change Request Form

Changes are an inevitable part of projects. While changes can be disruptive, they are far better than to deliver the wrong thing! This simple change request also turns into an analysis sheet once it is submitted.

Name of Project:	Greek Festival Event Management Plan		
Name of Requestor:	Allison Murrell		
Summary of Request			
Replace " <i>Best Practices Guide</i> " with " <i>Event Management Plan</i> ".			
Reason for Request			
More accurately reflect needs of Sponsor.			
Impact of Change			
Will increase the usability of final document and help them to reach their goals.			
Project Team Use Only			
Change Request ID	001	Assigned To: AM	
Analysis Due	2/20/16	Support Resources	N/A
Analysis Summary			
Good Plan. Added more work, but enough float to not impact completion data.			
Recommended Action	Approve	Project Manager	Allison Murrell
PM Decision	Approve	Date	2/16/16
Requestor Advised	2/17/16	Project Plan Updated	2/17/16

Greek Festival Event Management Plan
Murrell, Allison Spring 2016

Guidelines:

- **Name of Project:** The project for which the change is being requested
- **Name of Requestor:** The person who is asking for the change to be made
- **Summary of Request:** The description of the request that is being asked for. This should be as detailed as necessary to allow the project team to understand exactly what is being requested. It should clarify any of the following that apply:
 - Scope changes
 - Schedule changes
 - Budget changes
 - Quality standard changes
 - Risk tolerance changes
 - Specific resource changes
- **Reason for Request:** The background and explanation to the request. This should explain why the request is important to the project and should highlight the benefits that will be gained by incorporating the change into the initiative. In conjunction with the next field (Impact if Change is Not Made), it will provide the logic for the request being made
- **Impact if Change is Not Made:** The repercussions for the project if the change is not approved. This should be a realistic assessment and should focus on challenges with the project's ability to meet its goals; ultimately, the decision on whether to approve or reject will (at least in part) come down to the costs identified here versus the costs of making the change. This field combines with the previous field (Reason for Request) to provide the logic for the request being made.

The remaining fields are for the use of the project team in assessing the request:

- **Change Request ID:** The request should be logged in a change log and a unique identifier assigned that will assist with tracking. All documentation associated with the change should carry this ID.
- **Assigned To:** The person assigned to carry out or to lead the analysis. This person should be viewed as the change request owner and should be the person who has the greatest understanding of the area(s) of the project that are impacted and the extent of that impact. See also Support Resources below.
- **Analysis Due:** The date by which the owner/person that the analysis is assigned to needs to have completed their analysis and provided a recommendation to the project manager for submission to the change control board. This date should be determined by the owner and project manager in partnership and should reflect the unique circumstances of each change; arbitrary timelines will not be successful.
- **Support Resources:** Additional team members and/or stakeholders who will assist the change owner in conducting the analysis. These may not be required for every change, but for more complex requests these individuals will be invaluable. Individuals should be identified rather than teams to drive accountability.
- **Analysis Summary:** The summary of the work carried out by the owner and any support resources. This should focus on the impact of the change to the project constraints (including quality and risk) and should also reflect areas of uncertainty where the impact may be larger than has been able to assess accurately within the analysis period. This area should also consider the impact to the deliverables if the change is not approved.
- **Recommended Action:** This is the recommendation of the change owner.
- **Project Manager:** The PM should put their name to the recommended action to indicate that they have discussed the change with the owner after the analysis has been completed; they are in agreement with the recommendation that is going to the change control board.
- **Change Board Decision:** The decision reached by the change control board or equivalent governance function after reviewing the request and analysis.
- **Change Board Date:** The date that the change control board decision is made.
- **Requestor Advised:** The date that the person requesting the change is advised of the change control board decision. This is the accountability of the project manager although they may delegate responsibility to a member of the team (commonly the team's change owner).
- **Project Plan Updated:** The date when all of the changes to the project plan have been made (if necessary) after the change control board's decision. This is the accountability of the project manager.

Greek Festival Best Practices Guide Project Communication Matrix

[illegible]

Greek Festival Stakeholder Registry								
	Name	Role	Communication form	Interest	Power	Notes	Major Concerns	Relationship Manager
1	Allison Murrell	PM	Every way possible	4	4	Super awesome	Maintain pos relationships	Self
2	Angelic Pournatzis	Chairperson	Meetings, Email	4	4	Hard working rock stars	Project is done well	PM
3	Bill Kapadis	President Parish Council	Email	2	2	Very interested	Project is done well	PM
4	Father Vasilios	Priest	Meetings	3	2	Very supportive	Using project for other events	PM
5	Committee	Advisers	Email, meetings	4	4	Supportive and involved	Completion of project	PM
6	Parish	Church members/ Greeks	Word of mouth, flyers	1	2	Interested; positive	Project helps/ is useful	PM
7								
8								

Power/ Interest matrix				
				1,2,5
6	3	4		
1	2	3	4	Interest

Research plan and what is include and excluded

1. Research plan
 - a. Background information
 - i. What is already known
 - b. Research goals
 - i. Research current Greek Festival TOC outline
 1. Additional information/ sections can be added based on research
 - c. Methodology
 - i. Descriptive research
 1. The status quo and Best Practices currently in use
 - ii. Data
 1. Information from the digital drop box
 2. Volunteers' documentation
 3. Documents and information from other Greek Festivals
 - iii. Barriers and pitfalls
 1. Data collection system may be incomplete
 2. Volunteers may not want to document processes and procedures
 - iv. Fieldwork and timeframe
 1. Fieldwork at the Orthodox Church
 2. Starting December 7, 2015 till at least January 7, 2016
 3. May have follow up request still coming in from initial research
 - d. Outcomes and expectations
 - i. Enough information to begin drafting Greek Festival Best practices guide
 - e. Timeframe for research
 - i. Data collection
 1. December 7, 2015 to January 7, 2016
 - ii. Review and analysis
 1. January 7, 2016 to March 30, 2016
 - iii. Submission of final document
 1. April 18, 2016 (Approximately)
2. Included
 - a. Greek festivals across America
 - i. US and Canada
 - ~~i. Emphasis on Chicago and California~~
 1. If pertinent information can be found
 - ii. Answer these questions
 1. When are festivals?
 2. Length (in days) of festivals?
 3. Heat map of where festivals are
 4. Average age of annual festivals
 5. Scatterplot of age and # of visitors
 6. Average costs of similar items
 - a. Gyro, greek coffe, ect.

- b. Lean
 - i. Tools, Techniques and practices
 - 1. For application of practices on the plan, and to be included within the metrics plan for future analysis
- 3. Excluded
 - a. Non- Greek cultural based festivals and fairs

Research Sources and Keywords

1. Sources

- a. Greek Festival Digital Dropbox
- b. Church's records/ QuickBooks
- c. Festival Chairperson's documentation
- d. Festival subcommittee members documentation
- e. Festival booth team leaders documentation
- f. Google for other similar seized Greek Churches with Greek/ cultural festivals
- g. American Hellenic Educational Progressive Association (AHEPA)
- h. Lean
 - i. <http://www.leanproduction.com/>
 - ii. www.mindtools.com/
 - iii. <http://www.qualitymeasures.ahrq.gov/expert/expert-commentary.aspx?id=32943>
 - iv. "The Ultimate Guide to Business Process Management: Everything you need to know and how to apply it to your organization" by Theodore Panagacos
 - v. "Lean Six Sigma for Service : How to Use Lean Speed and Six Sigma Quality to Improve Services and Transactions" by Michael George
 - vi. "Lean Six Sigma For Beginners: A Quickstart Beginner's Guide To Lean Six Sigma" by G. Harver
 - vii. "The Lean Six Sigma Pocket Toolbook: A Quick Reference Guide to 100 Tools for Improving Quality and Speed" by Michael L. George

2. Key words

- a. Greek Festival
- b. Greek Orthodox churches in America
- c. Event planning for Greek
- d. Greek Culture
- e. Cultural Festival/ Event
- ~~f. Chicago Greek Festival~~
 - ~~i. Taste of Greek town~~
 - ~~ii. Lincoln Park Greek Fest~~
 - ~~iii. St. Andrews Greek Festival~~
 - ~~iv. Cold Cost Greek Festival~~
 - ~~v. St. Demetrios Greek Festival~~

~~vi. Big Fat Greek Festival of Niles (outside of Chicago)~~

~~g. California Greek Festival~~

~~i. LA Greek Fest~~

~~ii. Sac Greek Festival~~

~~iii. Hellenic Festival~~

~~iv. OC Greek Festival~~

~~v. Valley Greek Festival~~

~~vi. Oakland Greek Festival~~

~~vii. Fresno Greek Festival~~

~~h.f.~~ Greek Orthodox church event

~~i.g.~~ Lean

- i. Lean Quality Improvement
- ii. Lean tools and techniques
- iii. Lean Application
- iv. Lean Processes
- v. Applying Lean tools
- vi. Lean templates
- vii. How to use Lean techniques/ tools

Greek Festival Best Practices Guide Project Risk Registry, Analysis and Implementation

Risk Rank & ID		Risk Statement & Category			Risk Analysis Matrix								Risk Response Strategy and Implementation	
Risk Rank	Unique ID #	Risk Statement	Risk Category		Risk Probability	Risk Impact		Schedule Score	Cost Score	Final Score	Quantitative Risk Impact		Risk Response Strategy	Implementation
			Initial Risk Owner	Risk May Occur In		Schedule	Cost				Schedule Impact (Days)	Cost Impact (\$)		
	2	Lack of information online	AM		3	2	1	6	3	9	2 weeks	\$ 200	Mitigate: Start research as soon as possible, get help from Librarians and advisors if needed	
	3	Lack of stakeholder involvement	AM		2	3	1	6	2	8	3 weeks	\$ 60	Mitigate: create positive environment with open collaboration and active engagement	
	6	Chairperson's support is lost	AM		1	4	1	4	1	5	2 months	\$ 325	Prevent: Maintain positive relationship with collaboration and active engagement	
	7	Stakeholders become unsupportive/ negative	AM		1	4	1	4	1	5	3 weeks	\$ 225	Mitigate: create positive engagement with open collaboration and active engagement	
	9	Scope is increased	AM		2	1	1	2	2	4	1 month	\$ 500	Transfer: Use others as tool to prevent scope creep. If required, run through change process first to justify	
	11	Unforeseen expenses	AM		1	1	1	1	1	2	1 day	\$ 500	Use change process to decide if expense is truly necessary	
	1	Lack of access to documents	AM		2	4	1	8	2	10	1 month	\$ 50	Work with chair/subcommittee to get access	Did not happen
	5	Can't connect to digital drop box	AM		3	1	1	3	3	6	5 days	\$ 12	Accept: Work with IT to get access	Did not happen
	8	Missing Documents	AM		2	1	1	2	2	4	2 weeks	\$ 100	Track down people; asks for help in finding or recreating paperwork	Did not happen
	10	Delays in access to digital drop box	AM		1	2	1	2	1	3	3 days	\$ 10	Accept	Did not happen
	4	IRB is rejected	AM		2	3	1	6	2	8	0	\$ -	Risk was eliminated - No response needed	N/A

September 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 Labor Day	8 Email Deliverables to Committee Meet with LuAnne	9	10 Committee Response	11 PPM 1 Due	12
13 Grandparents Day Rosh Hashanah	14	15	16	17 Present Project to Parish Council	18	19
20	21 Email Deliverables to Committee	22 Yom Kippur	23 Committee Response Autumn Begins	24	25	26
27	28	29	30			

October 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2 PPM 2 Due	3
4	5 Email Deliverables to Committee	6 Meet with LuAnne	7 Committee Response	8	9	10
11	12 Columbus Day	13	14	15	16	17
18	19 Email Deliverables to Committee	20 Meet with LuAnne	21 Committee Response	22	23 PPM 3 Due	24
25	26	27	28	29	30	31 Halloween

November 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Daylight Savings Ends	2 Email Deliverables to Committee	3 Meet with LuAnne	4	5	6	7
8	9	10	11 Veterans Day	12	13	14
15	16 Email Deliverables to Committee	17 Meet with LuAnne	18 Committee Response	19	20 PPM 4 Due	21
22	23	24	25	26 Thanksgiving	27	28
29 Final Presentation Submitted	30 PRESENTATION					

December 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 PRESENTATION	2	3	4	5
6 Hanukkah	7 Updates/ Final Materials Submitted Start Research	8 Meet with LuAnne?	9	10	11	12
13	14	15	16	17	18	19
20	21	22 Winter Begins	23	24	25 Christmas Day	26 Kwanzaa
27	28	29	30	31 New Year's Eve		

January 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 New Year's Day	2
3	4	5	6	7	8	9
10	11 Email Deliverables to Committee Classes begin	12	13 Committee Response	14	15	16
17	18 Martin Luther King, Jr. Day	19	20	21	22 Class 1	23
24	25 Email Deliverables to Committee	26	27 Committee Response	28	29	30
31						

February 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2 Groundhog Day	3	4	5 PPM 1	6
7	8 Email Deliverables to Committee Chinese New Year	9	10 Committee Response Ash Wednesday	11	12 Lincoln's Birthday Class 2	13
14 St. Valentine's Day	15 President's Day	16	17	18	19	20
21	22 Email Deliverables to Committee	23	24 Committee Response	25	26 PPM 2	27
28	29					

March 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2 Go/ No Go 5PM	3	4 Class 3	5
6	7 Email Deliverables to Committee	8	9 Committee Response	10	11 Joint Class	12
13 Daylight Savings Begins	14 SPRING BREAK WEEK	15	16	17 St. Patrick's Day	18 PPM 3	19
20 Spring Begins Palm Sunday	21 Email Deliverables to Committee	22	23 Committee Response Go/ No Go 5PM Purim	24	25	26
27 Easter Sunday	28	29	30	31		

April 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Class 4 April Fool's Day Substantial Completion	2
3	4 Email Deliverables to Committee	5	6 Committee Response	7	8 PPM 4	9
10	11	12	13	14	15	16
17	18 Final Presentation Due 8AM Oral Defense?	19 Oral Defense?	20	21	22 Passover Earth Day	23
24	25 All Deliverables Submitted on Blackboard 5:30PM	26 Final Binder Delivered to Office 5:30PM	27 Final Grades?	28	29	30 Hooding Ceremony!

Expectations for PM 686A and 686B Capstone Project Advising

Student Name: Alison Howell PM 686A or PM 6896B (Circle one) Semester: Fall 18

Area of Responsibility	Student	Primary Advisor (1 person)	Committee Members (2 people)	Instructor of Record (IOR) and Admin Staff
Project Management	PRIMARY OWNER	Coaching, feedback and assessment	Coaching, feedback and assessment input	
Communication and Stakeholder Management	<ul style="list-style-type: none"> • Clear description of project • Proactive selection of Advisor and Committee members • Demonstrate effective communication and stakeholder management by determining and coordinating necessary and agreed modes and setting expectations for timing, and emphasis or tailoring of feedback and communication across with PA and committee (and other stakeholders) • Provide regular status reports as agreed with PA and committee • Identify and resolve communication issues • Identify, balance and resolve 	<ul style="list-style-type: none"> • Email confirmation of agreement to serve • Availability as agreed 	<ul style="list-style-type: none"> • Email confirmation of agreement to serve • Availability as agreed 	<ul style="list-style-type: none"> • Faculty specialties matrix • Session Lectures • Syllabus • Blackboard materials • Announcements • AV set up • Final presentation schedule and logistics • Student and committee support as requested • Adjunct Faculty appointment letters • Escalation path

	contradictory inputs <ul style="list-style-type: none"> • Discuss and get signatures for "Expectations" from student, advisor and committee members and submit to PM office. 			
Project Deliverables	<ul style="list-style-type: none"> • Complete work per syllabus • Incorporate feedback from PA, committee and stakeholders 			
Feedback	<ul style="list-style-type: none"> • Determine type, timing and format of feedback from PA and committee • Solicit, coordinate and integrate feedback from stakeholders, PA and committee for PPMs and final project deliverables • Identify, balance and resolve contradictory inputs 	Provide agreed feedback on timely basis	Provide agreed feedback on timely basis	
Final Presentation	<ul style="list-style-type: none"> • Prepare • Present 	<ul style="list-style-type: none"> • Attend • Provide Feedback 	<ul style="list-style-type: none"> • Attend • Provide Feedback 	<ul style="list-style-type: none"> • Coordinate schedule and logistics
Assessment and Grading		<ul style="list-style-type: none"> • Coordinate input from committee for 4 PPMs and final 	Provide input to primary advisor for: 4 PPMs Final deliverables	<ul style="list-style-type: none"> • Input 4 PPMs and final deliverables scores to Blackboard

		project deliverables <ul style="list-style-type: none"> • Assignment of PPM scores • Provide scores to IOR • Go/No checkpoint recommendation • Assign final grade 	Go/No checkpoints	<ul style="list-style-type: none"> • Ensure consistency across students • Communicate go/no-go decisions to students • Input final grade to UA Online
Administrative Documents	<ul style="list-style-type: none"> • GSP preparation and submission to PM Office • Signed Expectations agreement • IRB submittal (686A) • Apply for graduation (686B) • RSVP for Hooding and commencement (686B) 			<ul style="list-style-type: none"> • Graduate Studies Plan (GSP signatures and processing) • Include signed "Expectations" form in student file. • DF paperwork and annual progress report for students • Graduation Audit • Graduation Requirement Report (GRR) • Archive final project deliverables

Student is responsible for obtaining the following signatures and submitting completed form to PM office to include in student file.

I understand and agree to the expectations described above:

Student Signature:  Date: 9-4-15

Advisor Signature:  Date: Oct 1, 2015

Committee Member:  Date: 21 Sept 2015

Committee Member:  Date: 10/1/2015

Committee Submission Matrix

Task	9/8/2015	9/21/2015	10/5/2015	10/19/2015	11/2/2015	11/16/2015
Admin						
Graduate Studies Plan	X					
Submit to Meuy	X					
Confirm Approval	X					
Get signatures?	X					
Committee Members						
Create deliverable schedule for	X					
Send out deliverable schedule to	X					
Abstract	X		X			
Letter of Support						
Knowledge Areas						
Application and performance	X	X	X	X		
Description and measure	X	X	X	X		
Mesurementn data	X	X	X	X		
Lessons learned narrative	X	X	X	X		
Internal Review Board					11/6/15 Submition date	
Register for class			X			
Take Class			X			
Fill out paperwork			X			
Send in Paperwork for review				X		
Define method for measuring	X					
Craft a method	X					
Research Plan						
Description of what kind of		X	X	X		
Define what will be included/		X	X	X		
Research Sources and Key Words		X	X	X		
Advisory approved research methods		X			X	Approval
Description of Project deliverables	X	X	X			
Requirements Documentation	X	X				
Table of Contents for PM Plan and Final	X	X				
PM Plan					X	X
Charter					X	X
Project Objectives	X				X	X
Scope Statement	X	X			X	X
Objectives/ Outcomes	X				X	X
Assumptions/ Constraints	X				X	X
Milestones	X				X	X
Metrics/ KPI	X				X	X
Critical Success Factors	X				X	X
Stakeholder Management		X			X	X
Stakeholder Registry	X	X			X	X
Stakeholder Analysis	X	X			X	X
Time Management		X			X	X
WBS	X	X			X	X
Gantt Chart	X	X			X	X
Change Management Plan			X	X		X
Risk Management Plan			X	X		X
Risk Registry and Analysis			X	X		X
Cost Management Plan			X	X		X
Quality Management Plan			X	X		X
HR Management Plan			X	X		X
Requirements Traceability Matrix			X	X		X
Communication Management Plan			X	X		X
Procurement Management plan			X	X		X
Close out documents						
Status Reports	X	X	X	X	X	X
Lessons Learned Narrative					X	X
Presentation						
Final Presentation			X	X	X	X

**Greek Festival Best Practices Guide Project
Resource Assignment Matrix**

WBS	Project Task	Sponsor	Project Manager	Primary Adviser	Committee Members
1	Capstone				
1.1	PM 686A				
1.1.1	Admin				
1.1.1.1	Graduate Studies Plan				
1.1.1.1.1	Submit to Meuy		R		
1.1.1.1.2	Confirm Approval		R		
1.1.1.1.3	Get signatures?		R	A	A
1.1.1.2	Committee Members				
1.1.1.2.1	Submit Request		R		
1.1.1.2.2	Print Approval		R		
1.1.1.2.3	Meet with Primary		R	C	
1.1.1.2.4	Create deliverable schedule for their review		R		
1.1.1.2.5	Send out deliverable schedule to committee members		R	C	
1.1.1.3	Abstract				
1.1.1.3.1	Draft		R		
1.1.1.3.2	Edit		R	C	
1.1.1.3.3	Final		R	C	
1.1.1.4	Letter of Support				
1.1.1.4.1	Contact Parish Council/ Father Vasili	R	R		
1.1.1.4.2	Receive letter	R	R		
1.1.1.4.3	Submit letter	I	R	A	A
1.1.2	Knowledge Areas				
1.1.2.1	Stakeholder Management				
1.1.2.1.1	Draft		R		
1.1.2.1.2	Edit		R	C	C
1.1.2.1.3	final		R	C	C
1.1.2.1.4	Submit		R	I	I
1.1.2.2	Quality Management				
1.1.2.2.1	Draft		R		
1.1.2.2.2	Edit		R	C	C
1.1.2.2.3	Final		R	C	C
1.1.2.2.4	Submit		R	I	I
1.1.2.3	Communication Management				
1.1.2.3.1	Draft		R		
1.1.2.3.2	Edit		R	C	C
1.1.2.3.3	Final		R	C	C
1.1.2.3.4	Submit Paper		R	I	I
1.1.2.4	HR Management				
1.1.2.4.1	Draft		R		
1.1.2.4.2	Edit		R	C	C
1.1.2.4.3	final		R	C	C
1.1.2.4.4	Submit Paper		R	I	I
1.1.2.5	Compile KA and submit as Final		R	I	I
1.1.3	Internal Review Board				
1.1.3.1	Register for class		R		
1.1.3.2	Take Class		R	I	I
1.1.3.3	Fill out paperwork		R	C	C
1.1.3.4	Send in Paperwork for review		R	C	C
1.1.3.5	Wait for review		R	I	I
1.1.3.6	Edit and make corrects		R		
1.1.3.7	Submit/ wait for paperwork review from IRB		R	C	C
1.1.3.8	Approved/ Rejected		I	I	I
1.1.3.9	Reject- Revise and resubmit		R	I	I
1.1.3.10	Define method for measuring project progress				
1.1.3.10.1	Craft a method		R	I	I
1.1.3.10.2	Review with committee		R	C	C
1.1.4	Project Deliverables				
1.1.4.1	Research Plan				
1.1.4.1.1	Description of what kind of research, preferred methods		R	I	I
1.1.4.1.2	Define what will be included/ excluded		R	I	I
1.1.4.1.3	Define research sources and keywords		R	I	I
1.1.4.1.4	Submit to Advisors for approval		R	C	C
1.1.4.1.5	Wait for approval		I	R	R
1.1.4.1.6	Go/ No Go		I	R	R
1.1.4.2	PPM #1				
1.1.4.2.1	Draft PPM docs		R		
1.1.4.2.2	Edit PPM docs		R		
1.1.4.2.3	Submit to committee		R	C	C

Legend

Responsible	R
Accountable	A
Consulted	C
Informed	I

1.1.4.2.4	Wait for comments		R	I	I
1.1.4.2.5	Edit final docs		R		
1.1.4.2.6	Submit docs to Blackboard		R	I	I
1.1.4.3	PPM #2				
1.1.4.3.1	Draft PPM docs		R		
1.1.4.3.2	Edit PPM docs		R		
1.1.4.3.3	Submit to committee		R	C	C
1.1.4.3.4	Wait for comments		R	I	I
1.1.4.3.5	Edit final docs		R		
1.1.4.3.6	Submit docs to Blackboard		R	I	I
1.1.4.4	PPM #3				
1.1.4.4.1	Draft PPM docs		R		
1.1.4.4.2	Edit PPM docs		R		
1.1.4.4.3	Submit to committee		R	C	C
1.1.4.4.4	Wait for comments		R	I	I
1.1.4.4.5	Edit final docs		R		
1.1.4.4.6	Submit docs to Blackboard		R	I	I
1.1.4.5	PPM #4				
1.1.4.5.1	Draft PPM docs		R		
1.1.4.5.2	Edit PPM docs		R		
1.1.4.5.3	Submit to committee		R	C	C
1.1.4.5.4	Wait for comments		R	I	I
1.1.4.5.5	Edit final docs		R		
1.1.4.5.6	Submit docs to Blackboard		R	I	I
1.1.4.6	Presentation				
1.1.4.6.1	Draft		R		
1.1.4.6.2	Edit		R	C	C
1.1.4.6.3	Final		R	I	I
1.1.4.6.4	Present Presentation		R	I	I
1.1.5	Submit Final Documents for Class		R	I	I
1.2	PM 686B				
1.2.1	Research				
1.2.1.1	Research Festival History	I	R		
1.2.1.2	Research Other Greek Festivals	I	R		
1.2.1.3	Conversation with stakeholders	I	R		
1.2.2	Deliverables				
1.2.2.1	Deliverables #1				
1.2.2.1.1	Draft guide section I Charter		R		
1.2.2.1.2	Edit guide		R		
1.2.2.1.3	Submit to Committee for review		R	C	C
1.2.2.1.4	Review comments and update guide	I	R	I	I
1.2.2.2	Deliverable #2				
1.2.2.2.1	Draft Guide section ii and iii		R		
1.2.2.2.2	Edit Guide		R		
1.2.2.2.3	Submit to Committee for review		R	C	C
1.2.2.2.4	Review comments and update guide	I	R	I	I
1.2.2.3	Deliverable #3				
1.2.2.3.1	Draft Guide section iv, v and iv		R		
1.2.2.3.2	Edit sections		R		
1.2.2.3.3	Submit to Committee for review		R	C	C
1.2.2.3.4	Review comments and update guide	I	R	I	I
1.2.2.4	Go/ No Go Phase Gate		I	R	R
1.2.2.5	Deliverable #4				
1.2.2.5.1	Draft guide sections vii, viii, ix, x		R		
1.2.2.5.2	Edit sections		R		
1.2.2.5.3	Submit to Committee for review		R		
1.2.2.5.4	Review comments and update guide	I	R		
1.2.2.6	Deliverable #5				
1.2.2.6.1	Draft section xi, xii, xiii		R		
1.2.2.6.2	Edit guide		R		
1.2.2.6.3	Submit to Committee for review		R	C	C
1.2.2.6.4	Review comments and update guide	I	R	I	I
1.2.2.7	Compile Guide				
1.2.2.7.1	Compile guide and review for constituency	I	R		
1.2.2.7.2	Submit to Committee for review	I	R	C	C
1.2.2.7.3	Review comments and update guide	I	R	I	I
1.2.2.8	Finalize guide	I	R	C	C
1.2.2.9	Presentation				
1.2.2.9.1	Draft presentation		R		
1.2.2.9.2	Edit presentation		R		
1.2.2.9.3	Submit to Committee for review		R	C	C
1.2.2.9.4	Review comments and update presentation	I	R	I	I
1.2.2.9.5	Present Presentation	I	R	C	C
1.2.3	Submit Final Paperwork				
1.2.3.1	Project Complete	I	R	I	I

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 9/11/15 _____


Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project				Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival				<i>Key tasks completed and key tasks started.</i> Completed: Abstract written Method for project progress and KPI's defined Scope defined Milestones and Critical Success Factors defined Knowledge areas selected Started: Stakeholder, Time and HR management plan for project drafted and reviewed Meetings with key stakeholders schedule	
Current Status				Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> PPM #1 deliverables submitted on time with the exception of the Letter of Support which was delayed due to car accident KPI: 1 overdue task – Support Letter. SPI: 1 Earned as much as we planned			X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; next big thing is IRB registration and class, defining research methodology and drafting IRB paperwork. Also PPM#2 documents; Signed GSP, Final abstract, and Final Charter/Stakeholder/ Time plans	
Anticipated Changes/Key Risks/Corrective Actions				Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Keeping key stakeholders engaged and positive about project Getting access to pervious years documents				<i>Wrap up with key items and where help needed from stakeholders.</i> Need help with MS Project schedule Need help with KPI's and metrics	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 10/9/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> Completed: Draft of research plan and key words PPM #2 Committee submittals #2 and 3 Started: IRB Training Class modules Documents for PPM #3	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> 32% duration passed and 43% work completed PPM #2 deliverables submitted on time SPI: 1 % of Milestone Missed: 0% 0 out of 18 % of Overdue Tasks: 0% 0 out of 144		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; ahead on PPM #3, the next big milestone Behind in training classes but will make 10/23/15 deadline Also figured out the KA's	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty? Changes: Updating metrics to have meaningful measurements Updating the KA's to have more meaning and usefulness		<i>Wrap up with key items and where help needed from stakeholders.</i> Need help in crafting clear metrics that have meaning for both project and for KA's	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 10/9/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project				Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival				<i>Key tasks completed and key tasks started.</i> Completed: Completed and passed the IRB training Started: Application of Lean tools to analyze processes of festival PPM #4 submittal in process of being drafted	
Current Status				Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Ahead; saved several days since we don't have to submit IRB plan and wait for approval			X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; Working on PPM and no big risk ahead	
Anticipated Changes/Key Risks/Corrective Actions				Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty? Changes: Updated metrics to have meaningful measurements Considering updating CSF to have more meaning				<i>Wrap up with key items and where help needed from stakeholders.</i> Really excited about Lean tools and applying them in my project	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 11/6/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> Completed: PPM #3 Started: Application of Lean tools to analyze processes of festival PPM #4 submittal in process of being drafted Presentation Drafted final presentation	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Ahead; saved several days since we don't have to submit IRB plan and wait for approval Using time to do Lean analysis SPI:1 CPI:1 Millstone missed: 0 Overdue task: 0		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; Going great. PPM #4 and research plan approval are expected soon Working on storytelling for presentation	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty→ Very little impact; short trial Changes: Added Lean analysis to project Considering updating CSF to have more meaning		<i>Wrap up with key items and where help needed from stakeholders.</i> Really excited about Lean tools and applying them in my project	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell Date: 1/22/16

Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> <i>Research is complete.</i> <i>Charter has been drafted and submitted for review by committee and Sponsor.</i>	
Current Status		Forecast	
<div> <div></div> <div></div> <div></div> <div>X</div> </div> <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Charter drafted, and with Sponsor for review. Financial plan drafted. Schedule and plan drafted. SPI: .89 CPI: 1.11		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Yes; ahead of schedule. Deliverable I being reviewed and most of Deliverable II drafted.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead.		<i>Wrap up with key items and where help needed from stakeholders.</i> <i>Project is going swimmingly. Only concern is stakeholder management when it comes to processes mapping the booths next month.</i>	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 2/12/16 _____

Project Title: Greek Festival Best Practices Guide

Synopsis of Project				Progress Since Last Report
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival				<i>Key tasks completed and key tasks started.</i> Completed drafts of section III and III. Submitted PPM #1
Current Status			X	Forecast
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Financial plan in review. Schedule and plan in review. Risk drafted. Stakeholder drafted. Communication drafted. SPI: 1.0 CPI: 1.11				<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes. Continuing forward.
Anticipated Changes/Key Risks/Corrective Actions				Key Takeaways/Where Help Needed
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead. Working with busy sponsor/ stakeholders can be frustrating.				Stakeholders are excited but busy. Tring to nail down meetings is harder than it should be.

One Page PM 686B Project Status Report Dashboard

Name: Allison Murrell Date: 3/4/16


Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival.		<i>Key tasks completed and key tasks started.</i> <i>Research is complete. Analysis has been drafted.</i> <i>Deliverable III has been drafted.</i>	
Current Status		Forecast	
<div> <div></div> <div></div> <div></div> <div>X</div> </div> <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Communication, Risk and Stakeholder plans for festival drafted Research cross-comparison spreadsheet complete SPI:1 CPI: 1		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Yes; ahead of schedule. Deliverable III has been drafted. Cross-comparison spreadsheet was completed 11 days ahead of schedule.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead. May rename project – not sure. Still thinking about it.		<i>Wrap up with key items and where help needed from stakeholders.</i> <i>Project is going very well. Have a festival kick-off meeting where I'm planning to corner a few people to get some review of documents and get some information and opinions.</i>	

One Page PM 686B Project Status Report Dashboard

Name: Allison Murrell _____ Date: 4/1/16 _____

Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create an event management plan for local Greek festival		<i>Key tasks completed and key tasks started.</i> <i>Final event management plan is complete.</i>	
Current Status		Forecast	
 <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Deliverable complete.		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Substantial Completion has been met.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Finishing edits for compiled event plan. Working on final PM #4, and presentation.		<i>Working on presentation. Would like to do run through in classroom if possible.</i>	

PM 686A/B Work Log Narrative

8/28/15

Email advisers and ask/ confirm participation

Email GSP to May

Drafted abstract

Select knowledge areas (4)

Draft schedule and WBS

9/3/15

Drafted charter

Created calendar

Created binder (x2)

Drafted

Stakeholder plan and registry

Metrics ideas

HR Plan/ calendar and matrix

9/8/15

Submitted drafted documents to committee for review and comments

Updated HR plan

Defined expectation matrix and calendar

Drafted Time management plan

Updated Stakeholder plan and charter

Created digital files

Edited abstract

Defined why/ how on knowledge areas

Divided book into workbook and final submission book

9/9/15

Defined metrics/ project progress method

Defined objectives for project

Updated abstract and charter

9/10/15

Gathered documents for PPM#1

Reviewed and edited documents

Clarified scope and charter

9/11/15

Wrote status report

Finalized PPM #1 documents for submittal

Submitted PPM #1 documents on Blackboard

9/15/15

Update Gantt chart to combine PM 686A and B into one file

Removed draft deliverables for 686A and replaced with PPM deliverables

Added in Milestone from Charter

Added in PM 686B Go/ No Go estimated dates

9/16/15

Added due dates to Gantt chart

Drafted Change management plan and change log

Drafted Communication management plan and communication log

Registered for IRB class online thing

Outlined knowledge areas

9/17/15

Met with Angelic

Drafted letter of support for her to review/edit/sign/return

Updated Knowledge areas

Updated change management plan and log

Created change request forms

Updated communication plan, log

Create communication matrix

9/18/15

Created Risk management plan

Updated RACI

Created quality plan

Created project deliverables description

Created procurement management plan

Created cost management plan

Updated knowledge areas drafts

9/21/15

Created Keywords and sources

Created research plan draft

Updated Knowledge areas (x4)

Updated scope statement

Updated Greek festival best practice guide TOC

Created final report TOC

Created requirements documentation document

Updated schedule

Updated WBS

Submitted Documents to committee

9/22/15

Played with schedule

Updated Knowledge areas

Updated Committee submittal worksheet

Edited Abstract

Stared IRB modules

Updated Deliverables schedule worksheet

9/28/15

Review committee comments

9/29/15

Updated schedule

Updated research plan outline

Updated abstract

Updated Knowledge areas

10/1/15

Received expectations signatures

Updated schedule

Added resources to schedule

Updated/ refine research plan

Updated scope statement

Created status report

10/2/15

Updated KA's

Reviewed PPM #2 submittal items

Submitted PPM #2

10/5/15

Updated status report

Updated Knowledge areas

Updated Research plan

Updated PM Charter

Submitted documents to committee for review and comments

10/6/15

Met with LuAnn

Updated Knowledge Areas

Reviewed Capstone Library for info

10/15/15

Updated status report

Review Dr. Kim's comments

Reviewed Dr. Kim's submitted document

Reviewed research plan

Worked on KA's

10/9/15

Finalized and submitted status report

Updated KA's

Updated schedule

10/13/15

Combined PMP files

Updated PMP docs

Added attachments

Created time management plan and added to combined file

10/15/15

Reviewed and edited combined PMP

Reviewed and updated KA's

Downloaded Lean tools and templates

10/19/15

Created PDF for PMP with Appendix

Emailed Committee for review of PPM #3 documents

Uploaded draft PPM Docs to collaboration area

Updated Knowledge Areas and submitted for review

10/22/15

Updated Knowledge areas

Updated PMP

Edited schedule

10/23/15

Submitted PPM #3

10/30/15

Drafted Final Presentation PowerPoint

11/2/15

Reviewed festival photos for presentation

Submitted presentation draft and research plan to committee

Updated presentation

Updated schedule

Reviewed Final Deliverable requirements for PM 686A

Worked on Committee comments

11/3/15

Downloaded more photos for PowerPoint

Updated PowerPoint

Reviewed Luann's PPM #3 comments and made updates

11/5/15

Updated Abstract

Updated project deliverable discretion

Updated presentation

Searched for research material on Lean and application of lean processes

11/6/15

Submitted status report

Review PPM 686B syllabus and updated schedule accordingly

Reviewed Lean tools and templates

Reviewed other PM 686B Final Thesis papers

11/6/15

Created draft thesis paper

Updated final presentation

Reviewed Lean PDF's

Drafted Lean process analysis of Gyro stand, dinner booth, Kafenio and Taverna

11/10/15

Updated PowerPoint

Updated schedule

Read Lean implantation PDFs

11/12/15

Updated schedule

Updated PowerPoint

Updated charter

Updated PPM

Created final submittal book/ tabs

Printed documents for final submittal

11/14/15

Online library research

Placed books on hold, picked up half that were ready

Read/tagged books

11/16/15

Printed PFD's from research
Created PPM #4 docs for review
Emailed research plan for approval
Emailed committee for PPM #4 review
11/18/15
Update project plan
Appendix documents
Research more sources
Update PowerPoint
Learned how to add song to PowerPoint
Practiced PowerPoint for several hours
11/19/15
Updated PowerPoint
Read PDF's
Drafted Lessons Learned Narrative (2-3 pg paper for final)
11/19/15
Got more books at library
11/23/15
Emailed LuAnn updated PowerPoint
11/24/15
Reviewed PowerPoint presentation with LuAnn
Updated and edited PowerPoint presentation
Worked on Narrative report
11/25/15
Updated PowerPoint
Presented draft PowerPoint to practice group
Edits to abstract
11/27/15
Presented updated PowerPoint to practice group
Updated PowerPoint
Practiced presentation
11/29/15
Practiced presentation
Finalized PowerPoint and uploaded to blackboard
11/30/15
Updated narrative
Updated schedule
Baked baklava and cookies for presentation
12/1/15
Printed final presentation
Reviewed
Updated narrative
Gave oral defense of project
12/2/15
Reviewed oral defense feedback
Updated final docs

Printed final docs
Submitted final docs/ final book
12/7/15
Read research books
Got more books
12/12/15
Reviewed books/ essays
Organized
Tagged
Organized books that won't be used for return
12/14/15
Reviewed PMI templates
Researched festival processes
Reviewed possible Org chart make-up
Reviewed possible festival WBS
12/15/15
Updated Document files
Updated Gantt chart
Started New vs. Old Org chart
Started festival WBS
12/17/15
Read books
Started drafting out WBS
12/18/15
Additional festival management research
Typed up draft WBS
Drafted festival charter/ mission/ vision statement
Drafted risk management plan
Downloaded templates
12/20/15
Read books
Read papers
Updated festival WBS
Thought on organization structure
Downloaded Word 2016, Project 2016 and Visio 2016
12/21/15
Reviewed templates
Updated Excel workbook
Updated schedule
Contacted chairperson for access to digital drobox
Drafted kickoff agenda
12/24/15
Updates schedule
Updated WBS
Worked on excel workbook
Update to charter

Worked on thesis

12/27/15

Reviewed books and articles

Created deliverables list to work on

Drafted to-do list for week

12/28/15

Update schedule

Updated deliverables- Charter, Kick off meeting agenda, festival WBS and schedule

Accessed digital drop box

Reviewed digital drop box material

12/29/15

Updated charter

Updated TOC

Updated Kick-off agenda

Updated Timeline current/ option 1/ 2/ phases

Updated Org chart, options 1, 2 and 3

Updated to-do list

Drafted strategic planning guide

Drafted festival to-do lists by month and section

12/30/15

Reviewed reference material on how to do event management and planning

Updated project schedule

Updated festival schedule

Update timeline

Updated charter

Read docs on internal financial controls

12/31/15

Updated charter

Created festival schedule management plan

Drafted up financial control ideas

1/2/16

Met with chairperson- learned about festival practices, finances and reviewed research and docs

1/5/16

Updated charter

Revised timeline

Split kick off meeting agenda to allow for more productive meeting

Updated schedule/ WBS

Downloaded PM686B syllabus

Updated Project calendar/ schedule to align with deliverable deadlines

1/7/16-1/13/16

Took LEAN Six Sigma class and received Green Belt

Learned how to use Visio software for process flow

Learned how to apply LEAN six Sigma tools and techniques to project

1/14/16

Reviewed draft books

Updated schedule

1/19/16

Updated calendar

Updated schedule

Researched Greek Festivals in Chicago and California

Drafted brief

Update GSP/ Reviewed graduation checklist

Printed committee expectations

1/20/16

Updated event charter

Updated project schedule- added close out items, fixed presentation time

Reviewed and updated close out docs

Updated festival calendar

Updated festival WBS

Updated festival Gantt chart

1/21/16

Created excel cross comparison chart of Greek festival across America/ Canada

Created schedule by role

1/25/16

Updated schedule

Added to cross comparison spreadsheet

Reviewed change management plan

Filled out change request

Processed change request

1/26/16

Approved change request

Added change to change control log

1/27/16

Updated committee submission schedule

Emailed committee

Updated schedule with research change

Create presentation draft

Revised festival schedule

1/28/16

Updated festival schedule

Created Festival timeline

Updates to-do list by month

Created Schedule management plan

Found procurement template

Reviewed financial docs

Created financial plan

Created cost management plan

Corrected spreadsheet of previous years booth income

1/29/16

Reviewed original festival docs

Drafted ROM Expense budget

2/2/16

Reviewed PPM 1 deliverables

Drafted PPM documents

Confirmed in person with Rodger that the expectations contract does not have to be updated if nothing has changed

2/3/16

Emailed GSP to Meuy

Updated KA's

Created Project Progress spreadsheet

Updated risk registry

Created deliverable matrix

2/4/16

Updated PPM #1 docs

Submitted PPM #1

2/5/16

Created folders/ layout for PPM #2, 3, and 4

Worked on thesis

2/8/16

Emailed committee deliverable 2 draft

Worked on Cross comparison spreadsheet

2/10/16

Created 2/12/16 status report

Updated festival ROM budget spreadsheet

Texted sponsor to get additional festival docs and to go over sections I, II, and III

Worked on cross-comparison spreadsheet

2/15/16

Created bibliography

Update abstract

Updated key words

Updated TOC

2/16/16

Drafted research analysis validation

Email committee to request approval of research analysis

Updated cross-comparison spreadsheet

Drafted heat map

Research analysis was approved

2/17/16

Updated heat map

Updated schedule

Updated project progress

Updated project deliverable

Worked on cross-comparison spreadsheet

2/18/16

Updated cross- comparison sheet

Updated PPM #2 docs

2/19/16

Updates to stakeholder management plan

Drafted stakeholder registry
Updated risk management plan
Created risk registry
Created event risk assessment/ checklist
Drafted communication plan
2/22/16
Updates to Risk section
Update to Stakeholder section
Update to Communication section
Emailed drafted sections to committee for review
Emailed Sponsor to set up meeting to review
Reviewed Project Plan
Reviewed and updated risk registry and added implementation
Updated knowledge areas
Submitted for committee for review
2/24/16
Updated schedule
Worked on cross-comparison spreadsheet
2/25/16
Submitted PPM #2 to Blackboard
Finished Research data collection for cross-comparison spreadsheet
2/29/16
Add observation data graphs to draft research paper
Created cross-comparison research graphs and add to draft research paper
3/1/16
Created descriptive research themes for cross comparison research
Updates and edits to research paper
3/2/16
Created and uploaded 3.4.16 status update to blackboard
Added research graphs to theses
Review other thesis papers for format and structure
Updated format and structure
3/3/16
Updates to thesis
3/7/16
Created change management plan and form for festival
Created festival procurement plan
Created festival HR plan
Draft volunteer handbook
Drafted volunteer signup sheets
Kickoff festival meeting
3/8/15
Revised org chart
Create schedule template for kitchen/ food prep
Drafted procurement costing sheet
3/9/16

Updates festival documents

Created procurement ordering and costing spreadsheet

3/10/16

Worked on procurement ordering and costing spreadsheet

Went to Carrs to define prices for spreadsheet

3/11/16

Added prices to spreadsheet and calculated per serving estimates

Worked on thesis

3/12/15

Worked on thesis

Meet with sponsor to review costing and ordering spreadsheet

3/13/16

Worked on thesis

3/14/16

Edited thesis

Submitted thesis for review to committee

Created incident report process and form template

Created health and safety plan

Created marketing worksheet and previous marketing options

3/15/16

Updates to costing and ordering spreadsheet

Drafted permit and vendor documents

3/16/16

Updates name change to final documents

Reviewed quality documents

Reviewed committee notes of thesis

3/17/16

Updates to Final deliverable TOC

Create volunteer handbook content

Updates to thesis content

Updates and corrections to format

Updates to schedule

3/18/15

Updates to PPM #3

Submitted PPM #3

3/21/16

Updated project schedule

Drafted final status report

Updated financial controls close out process

Updates lessons learned feedback process

Updates closeout checklist

Drafted close out procedure

Created Booth Set Up spreadsheet

Created Festival Planning Steps spreadsheet

3/22/16

Updated event plan TOC

Updated festival planning steps spreadsheet

Finished close out section

3/23/16

Edits and corrections to previous sections and reprinted for draft copy

Emailed sponsor and booth leads

3/24/16

Updated org chart, and updated in event plan sections

Update HR management

Created donor request letters, and thank you letters

3/25/16

Updated risk registry

Updated kitchen schedule

Updated procurement plan

Added Gantt chart back in with updates

Updated TOC

Updates to Festival set-up plan

Updates to festival cleanup plan

3/27/16

Meet with sponsor for documents review and updates

3/28/16

Updates and edits

Saved documents as PDF's and compiled Event Management Plan

3/29/16

Final edits to Event Management plan

Compiled and saved event plan as PDF

Submitted to Sponsor as Final document

Added spate files to sponsor digital drop box for future updates

Updated project schedule

Update the Knowledge Areas

Completed end of project checklist

Updated to lessons learned

Finalized draft presentation for PPM #4

Finalized PPM #4 submittal

Application of Knowledge Areas

- Description
- Measure
- Measurement Data Over Time
- Lessons Learned Narrative

Communication Management

1. Description
 - a. Communication will be key on this project. The Greek community is a very tight knit community and to prevent concerns or unmet needs communication will be kept very clear and very regular to ensure that everyone know what's going on at any time
2. Performance measurement method
 - a. Measure response time of emails/ phone call/ texts on project
 - i. Maximum response time of 72 hours
 - ii. Measurement will be taken throughout the project when a communication event happens
3. Measurement Data
 - a. 9/11/15
 - i. 16 points of contract with 12 responses returned within 72 hours
 1. 4 were not responded to at all
 - b. 10/2/15
 - i. 13 points of contract with 9 responses returned within 72 hours
 1. 4 were not responded to at all
 - c. 10/23/15
 - i. 5 points of contract with 2 responses returned within 72 hours
 1. 2 were not responded to at all
 - d. 11/20/15
 - i. 3 points of contact returned within 72 hours
 1. 2 were not responded to at all
 - e. 12/23/15
 - i. 10 points of contact returned within 72 hours
 1. 4 were not responded to at all
 - f. 1/29/16
 - i. 8 points of contact returned within 72 hours
 1. 3 were not responded to at all
 - g. 2/26/16
 - i. 6 points of contact returned within 72 hours
 1. 2 were not responded to at all
 - h. 3/18/16
 - i. 12 points of contact returned within 72 hours
 1. 8 were not responded to at all

- i. 3/28/16
 - i. 8 points of contact returned within 72 hours
 - 1. 2 were not responded to at all
- 4. Lessons Learned Narrative
 - a. Keep stakeholders engaged but not spammed is a tough line follow
 - i. 72 hour rule will allow stakeholders to have expectations that can be met, even if I'm not able to give them what they want
 - b. I don't respond to all emails; typically ones that require no follow-up such as thank you emails, or emails indicating comments have been submitted
 - c. This measure may have to be modified to better reflect the risk that it is attempting to mitigate
 - i. One of the few risks on this project is having stakeholders support turn negative from not feeling like they are properly involved
 - ii. This measure was an attempt to prevent that
 - iii. Will review and decide if change is needed
 - d. This measure is about measuring my response time to questions/ comments/concerns/ etc. and sometime a response is not always needed like if they email me back "thanks" or "see you then". It's not an indicator of me flaking, I just don't want to fill their inbox with one message responses. Texting? No problem, but email is too formal for a one word response.
 - e. Texting is the most informal form of communication, and sometimes get passed over
 - f. Group emails don't always need a reply or a reply all. I had several "reply all" emails that were "thanks" and needed no response.
 - g. I received no response at all to my group email asking for help in the set up section of the guide, and had to go to church to talk to the people directly. That worked out very well, and next time I'll just skip the email and grab people after church.

Stakeholder Management

- 1. Description
 - a. The Greek festival involves dozens of direct stakeholders (parish council, the volunteers, the subcommittee, the chairperson, etc.) and thousands of indirect stakeholders (the anchorage community that attends the festival). Each of them have distinct needs and wants that ought to be addressed. As the main fundraiser for the church it is imperative that the stakeholders are addressed and managed to ensure that the direct stakeholders don't get burned out and that the indirect stakeholders have a good time.
- 2. Performance measurement method
 - ~~a. Measure the inclusion of stakeholders by the rate of contact and the rate of follow up (both PM and Stakeholders rates)~~
 - ~~i. This will show the level of interest in the project~~

- ~~ii. It will also demonstrate the level of commitment that the stakeholders have to this project~~
 - ~~iii. The rate of follow up will establish commitment to the project~~
 - b. Measure the number of opportunities for engagement
 - i. Want a clear understanding of stakeholder interests and concerns
 - ii. Want stakeholders to have buy-in to process
 - iii. Measure email and text response rate
- 3. Measurement Data
 - ~~a. 9/11/15~~
 - ~~i. 16 points of contact/ 12 responses 4 non-responses~~
 - ~~1. Non-responses related to committee members accepting membership in committee and confirming meeting~~
 - ~~b. 10/2/15~~
 - ~~i. 13 points of contact/ 9 responses 4 non-responses~~
 - ~~1. Non-responses related to meeting to sign expectation contract and submittal comments~~
 - ~~c. 10/23/15~~
 - ~~i. 5 points of contact/ 2 responses 2 non-responses~~
 - ~~1. Non-responses related to submitting meeting questions and PPM comments~~
 - ~~d. 11/20/15~~
 - ~~i. 3 points of contact/ 2 responses and 1 non-response~~
 - ~~1. Non-response related to submittal comments~~
 - e. 12/23/15
 - i. Emailed 4 times with responses
 - ii. Texted with responses
 - f. 1/29/16
 - i. Emailed 2 times with responses
 - ii. Facebook messaged meeting request with responses
 - iii. Texted with responses
 - g. 2/26/16
 - i. Emailed 4 times with responses
 - ii. Texted twice with no response; followed up by email to ensure information went through
 - h. 3/18/16
 - i. Emailed 8 times with responses
 - ii. Attended kickoff meeting for Festival
 - i. 3/28/16
 - i. Emailed 6 times with responses
 - ii. Attended church to meet with booth leads and sponsor
- 4. Lessons learned narrative
 - a. I will be sending out more documents and requests then I will be follow up responses. So far, it's a "no news is good news" standard from the advisors. They

are very busy and are likely devoting their limited time resources to people who are in greater need of responses than I.

- b. This measurement will change soon
 - i. It is not giving me the information that I'd like
 - 1. I want a measurement that will give me something more substantive on the level of support of stakeholders
 - 2. LuAnn suggested this on 11/1/15 (being more clear on what stakeholders are reviewing)
 - 3. I'll spend some time this week seeing if the measure can be modified or if it has to be changed
- c. The new measurement is better
 - i. Rather than documenting and counting every interaction, it is more general measure of people responding to requests rather than a count of emails
- d. Getting people nailed down for chats is hard because people are busy. Trying to imagine a way I can send documents out without creating fear or panic –panic that can be eliminated by face-to-face interaction
- e. People can be busy. Trying to get together multiple people at the same time can be difficult.
- f. Stakeholders are not really thinking high level, and seem to be missing the point of the project. Will readdress with project sponsor, and see if what can be done to move people to that higher level of planning (not who's going to Costco, but who's in charge of making sure the Costco trip happens and the right stuff is procured).
- g. Email is a terrible way to communicate to direct, but detached stakeholders. It was much more productive to track them down after church and they were much happier because they could ask questions.

HR Management

- 1. Description
 - a. The Greek festival is run by volunteer. As are the advisors for the project. Proper HR management shows respect to the volunteers and sets clear expectations for both the volunteers and the people managing them. Since the Advisors are volunteers, it is important to take their needs/ wants into account
- 2. Performance measurement method
 - a. Method will be measured in adherence to set Committee Submittal Timeline
 - i. Number of late Submittals/ Total number of Submittals
 - b. Will also be measured in the number of met expectations for the advisors over the number of added expectations that were not made expressly clear at the beginning of the project
 - i. Added Expectations/ Baseline Expectations
 - ii. Change happens, but it is important the expectations of volunteers are clear and precise. Adding additional requirements may have to happen, but

it should be the exception and not the rule. It shows respect and thoughtfulness for the volunteer's time and dignity as a person

3. Measurement Data

- a. 9/11/15
 - i. 0 late submittals/ 1 submittal
- b. 10/2/15
 - i. 0 late submittals/ 2 submittals
- c. 10/23/15
 - i. 0 late submittals/ 4 submittals
- d. 11/20/15
 - i. 0 late submittals/ 6 submittals
- e. 12/23/15
 - i. 0 late submittals/ 4 submittals
- f. 1/29/16
 - i. 0 late submittals/ 3 submittals
- g. 2/26/16
 - i. 0 late submittals/ 3 submittals
- h. 3/18/16
 - i. 0 late submittals/ 2 submittals
 - 1. I did defer report submittal by a week, but I informed the committee in advance of deferment
- i. 3/28/16
 - i. 0 late submittals/ 1 submittal

4. Lessons learned

- a. The capstone requires a lot from the advisors and I feel as if I am overwhelming them
- b. Keeping with the Submittal schedule will help me from feeling like I'm piling work on the Advisors
- c. Submittals every two weeks may be too much review
 - i. Creating more work for committee than needed
- d. Staying on task is key to the next phase of the capstone project
 - i. There is so much work that will need to be done in a short period of time and being fair to the advisors will be important
 - ii. It's not fair to the advisors to be late with a submittal and expect to get any value out of that transaction
- e. Keeping the calendar in the front of my notebook really helps me to see deadlines approaching and keep up to date, and to not miss anything
- f. I need to look ahead to confirm that there are no other "double" submission dates ahead, and if so try and space them out. I have two due on 2/22/16 and it was a bit tough to get everything ready and I'm sure it was a bit overwhelming to the committee advisors.

- g. The report is much longer than anticipated and is in turn taking longer to complete. I also wish I would have got more feedback, but I hope that is because I needed so little help that but others needed more and thus got more.
- h. There would be 2 more submittals after 4/1/16, but since that's the Substantial Completion date for this project, they will be tracked elsewhere.

Quality Management

1. Description

- a. Quality is essential to the project because of the lack of metrics, CSF and QA at the festival itself. I will have to focus on this to so that I can ensure that the guide that is created is of a high, professional quality and include good metrics and QA to stand as a guideline in to how important there can be and hopefully teach the stakeholders a way of implementing these types of things to better their own event and not see it as a negative.

2. Performance measurement method

- ~~a. Methods for measuring quality will be based on the number of hours spent reworking~~

- ~~i. The more hours in a reporting period (class to class) the worse the situation~~

- ~~1. If rework is required, then it must be done. There is no threshold cap because the project must meet the November 30 milestone.~~

- ~~2. Excessive rework (more than 10 hours in a reporting period) will trigger a meeting with committee to discuss root cause~~

- ~~3. The project plan has scheduled editing time that is not rework. Rework will be defined as correcting of defective, failed or non-functional work~~

- b. Method for measuring quality

- i. Use Lean tool to analysis section of festival

- 1. There is one more PPM reporting period before the end of the semester

- 2. I will analysis a minimum of 4 of the 10 separate but distinct section of the Greek festival before the next reporting period

- a. This will help me to better understand the Lean process and how to apply them to the festival.

3. Measurement Data

- a. 9/11/15

- ~~i. No rework to date~~

- b. 10/2/15

- ~~i. No rework to date~~

- c. 10/23/15

- ~~i. No rework to date~~

- d. 11/20/15

- i. I have done 4 value stream mapped of festival areas

1. Working on the second phase of VSM which will required help from stakeholders → Future mapping
 - a. What can we do to fix the bottlenecks, now that they've been identified?
 - ii. VSM Gyro stand, Loukoumades stand, Taverna, and Kafenia stand
 1. Gyro stand has the most problems, partly because it is the busiest and most complex stand
 - e. 12/23/15
 - i. I have done 4 more value stream maps of the festival
 1. Not sure if these need future state maps; these are the ones that work well.
 - ii. VSP church tours, dinner stand, agora and cooking demo
 - f. 1/29/16
 - i. Certified Green Belt in Lean Six Sigma
 - g. 2/26/16
 - i. I have drafted the layouts in Visio for four of the booths
 - h. 3/18/16
 - i. I have drafted future state layouts that will hopefully be applied to next year's festival
 - i. 3/28/16
 - i. I have updated the layouts and the future state layouts
4. Lessons learned narrative
- a. ~~While to project has no rework hours currently, this metrics will be important in making sure that I hold myself to the highest standard in creating the project plan and the guide itself~~
 - b. ~~I'm very good at this.~~
 - i. ~~Or I'm delusional and the committee is polite~~
 - c. ~~May want to review measurement data next semester to better capture and protect against risk of low quality work.~~
 - d. Switching measurements will be good. I can practice applying Lean tools to the different sections and use that to help the volunteers to have a better festival next August.
 - e. The next step, fixing the bottlenecks will require direct stakeholder involvement
 - i. Greek culture doesn't take well to being told what to do, so this will require reaching out to the people who run those stands and brainstorm with them to find solutions to those problems. Collaboration is key
 - f. I think I'll limit the future mapping to the Gyro stand
 - i. It's going to be very complicated and controversial and I's rather focus my energy on one that is in a problem state.
 - g. Green Six Sigma class was awesome
 - i. I learned so much and I think everyone should take the class
 - ii. It will help me to better apply tools to help build efficiency into the festival

- h. Visio is not as intuitive as I thought and it took a bit longer than expected to get it to make something that would work. YouTube was very helpful in getting me passed some sticking points
- i. Stakeholders are 50/50 on if they will take the advice on future mapping. I'm hoping I can convince them, but ultimately they get to decide for themselves.
- j. I ended up not including the layouts in the final deliverable because I felt it didn't match the rest of the document. The Event plan was a high level planning documents, and these stuck out as a "weeds" level item. I removed it to keep maintain the purpose of the document. I felt that if it was included, people every year would flip to just that section and skip everything else. They will still be in the final digital file, just not in the complied guide.

Project Closeout Checklist Greek Festival Event Management Plan

1. Integration Management

Item	Response
<i>Project Charter:</i> <ul style="list-style-type: none"> Was the original intent and scope followed throughout the project? Were changes to the project charter captured appropriately? Did the project charter provide for the authority needed to execute and control the project appropriately? 	<ul style="list-style-type: none"> Yes Yes Yes
<i>Change Control:</i> <ul style="list-style-type: none"> Were changes to the scope documented during the project? Did the project team follow the change control process throughout the project? Was there enough flexibility in the change control process to allow for change when it was needed? 	<ul style="list-style-type: none"> Yes No team really, but yes the process was followed Absolutely
<i>Integrated Project Management Plan:</i> <ul style="list-style-type: none"> Have the processes been followed through completion? Have the processes been updated throughout the project to reflect changes and lessons learned? 	<ul style="list-style-type: none"> Yes Yes
<i>Lessons Learned:</i> <ul style="list-style-type: none"> What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> I crashed schedule would have been faster This project could have been done faster, with similar results

2. Scope Management

Item	Response
<i>Requirements:</i> <ul style="list-style-type: none"> Were the original requirements met by the final result of the project? Is there documentation tracing all requirements from planning through design and then implementation? Are all changes to the requirements documented appropriately? 	<ul style="list-style-type: none"> Yes Yes Yes
<i>Scope:</i> <ul style="list-style-type: none"> Have all changes to the scope been 	<ul style="list-style-type: none"> There were no changes to the scope, just the research plan and the name

<p>documented appropriately?</p> <ul style="list-style-type: none"> • Have all changes been applied to the final version of the project plan and other documents? 	<ul style="list-style-type: none"> • Yes
<p>Lessons Learned:</p> <ul style="list-style-type: none"> • What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> • Noe, it worked great
Project-Specific Items Related to Project Closure	

3. Time Management

Item	Response
<p>Estimating Accuracy:</p> <ul style="list-style-type: none"> • Does the final version of the project plan document the actual performance against the final approved baseline project plan? • Have the factors that made any estimates incorrect been documented so they can be applied to other projects? • Have all changes to the baseline and the reasons for them been documented correctly? 	<ul style="list-style-type: none"> • Yes • Yes • Yes

4. Cost Management

Item	Response
<p>Budget Estimating Accuracy:</p> <ul style="list-style-type: none"> • Does the final budget document all expenses and changes experienced during the project? • Have the factors that made any budget estimates incorrect been documented so they can be used in the organization going forward? • Have all changes to the budget and the reasons for them been documented? 	<ul style="list-style-type: none"> • Cost was not real on project, but was monitored to assure project progress • N/A • N/A
<p>Final Budget Report:</p> <ul style="list-style-type: none"> • Is there a final report that states the planned budget and the actual budget and reasons for differences between them? 	<ul style="list-style-type: none"> • N/A

5. Quality Management

Item	Response
Quality Control Results: <ul style="list-style-type: none"> Have the results from quality control been documented? Have the changes resulting from quality control efforts been documented in all appropriate areas? 	<ul style="list-style-type: none"> Yes Yes
Quality Assurance Results: <ul style="list-style-type: none"> Have all change requests resulting from quality assurance been documented and updates made throughout all applicable project documents? Have others in the organization been informed of applicable results from quality assurance? 	<ul style="list-style-type: none"> Yes N/A
Lessons Learned: <ul style="list-style-type: none"> What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> I would have liked more committee responses on the quality of work produced

6. Human Resource Management

Item	Response
Lessons Learned: <ul style="list-style-type: none"> What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> I would have liked to have more meeting with my committee to make sure that the product was meeting the academic expectations

7. Communication Management

Item	Response
Report Performance: <ul style="list-style-type: none"> Has the final project performance report been communicated to the appropriate stakeholders? Is there a separate communication that needs to go to external stakeholders? 	<ul style="list-style-type: none"> Yes Yes
Communicate Results of Project: <ul style="list-style-type: none"> Has the end result of the project been communicated to the appropriate parties? Is the organization ready for the 	<ul style="list-style-type: none"> Yes, they are very excited Yes, they say they are, but first they need to embrace, not just support phase 1

operational phase or next phase of the project?	
Lessons Learned: <ul style="list-style-type: none"> What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> More meetings, both with my committee and with stakeholders

8. Risk Management

Item	Response
Close risks/issues: <ul style="list-style-type: none"> Have all risks and issues been closed with the appropriate documentation? 	<ul style="list-style-type: none"> Yes
Communicate results: <ul style="list-style-type: none"> Have the final result of risks and issues been communicated to the owners and other appropriate parties? Have the project and organizational documents and processes been updated based on the results of the risks and issues? 	<ul style="list-style-type: none"> Yes Yes
Lessons Learned: <ul style="list-style-type: none"> What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team? 	<ul style="list-style-type: none"> IRB is no applicable to my project, and took up too much of the time only to be deemed “exempt”. Complete waste of everyone’s time.

9. Procurement Management

Item	Response
Close procurements: <ul style="list-style-type: none"> Have all procurement documents been updated to reflect the final disposition of the contracts based on the end of the project? Have the appropriate legal parties been notified of the conclusion of the project? Have documents for the operational phase or next phase of the project been created? 	<ul style="list-style-type: none">
Lessons Learned: <ul style="list-style-type: none"> What are the steps or processes that 	

could be changed in order to increase the chance of success or the overall health of the project and project team?	
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10. Stakeholder Management

Item	Response
<i>Close procurements:</i> <ul style="list-style-type: none">• Have all stakeholders been updated to reflect the final deliverable based on the end of the project?• Have stakeholders for the operational phase or next phase of the project been created?	<ul style="list-style-type: none">• Yes• Yes
<i>Lessons Learned:</i> <ul style="list-style-type: none">• What are the steps or processes that could be changed in order to increase the chance of success or the overall health of the project and project team?	<ul style="list-style-type: none">• Stakeholders are busy people

Lessons Learned Narrative Report

Project:

Alaska Greek Festival Event Management Plan

Why:

The annual Greek Festival in Anchorage Alaska is an event managed by a volunteers, a subcommittee and a chairperson. There are dozens of documents that relate to the operations of the event, and volunteers who know how things have happened in the past, but no clear guidelines or standard practices which leads to inefficiencies, conflicting ideas, confusion and waste.

The deliverable for this project would be the creation of a Greek Festival Event Management Plan. This guide would include a volunteer/human resources management plan, quality assurance methods, as well as metrics gathering systems with tools and techniques that can help the festival subcommittee evaluate resource usage and find efficiencies in their current processes.

Project Development:

Completed PM 686A: Planning and Initiating. Starting research and drafting over the winter break, then start Spring semester with PPM deliverables and the actual guide sections being developed. Also, there is a 40 page thesis paper. No one is calling it a thesis, but that seems to be what it is.

Completed PM 686B: Executing, Controlling and Closing. Close out the project plan, completed the final report, completed final presentation and finished all the work for the final deliverable.

Completed final deliverable: Alaska Greek Festival Event Management Plan.

Lessons Learned:

Below are my lessons learned from the PM 686 Capstone class as it relates to my project.

Knowledge Areas

I had a hard time nailing down what the knowledge areas deliverable was supposed to be. I understood intellectually what was required, but it took several attempts to figure out what was actually required. Initially I had thought it was more like a in depth analysis of how we are using selected knowledge areas on project, kind of like a narrative but more focused on the separate use of the KA. That was incorrect, and luckily, for me, I did not waste too much time on getting to the correct deliverable.

Going forward I have several clear metrics to use to give me meaningful information on how well my project is doing.

For a lesson learned I would encourage others to seek assistance and clarification before the first deliverable is due if there is any hint of doubt as to what the intended deliverable is.

Quality Metrics for the Knowledge Areas

I line with the KA's I struggled with finding good metrics that would be easy to measure and give me solid information on the current status of the project. These metrics are harder than you would think, and I changed them several times, as I came to a submittal date and realized that the data collected did not give me information that I could use to create an analysis of the status of the project.

My lesson learned from this is to reach out earlier to my advisors to help me figure out a better metrics that will help me get good data that is useful.

HR plan

In order respect the time of my advisors, I wrote a very through HR plan and I wish that I had requested more time from them. I worry sometimes that while we are all following the HR plan, that I am missing polishing some areas that other students aren't because their HR policy is more flexible.

Lesson learned: make sure that the HR policy has within it flexibility to shift without having to go through the full change management process. I'm not sure going through the whole process is worth adding in that flexibility, but it may have to be done next semester.

Risk Management

As far a risk management goes, I wish that I had read several more plan from other students doing their capstone projects. I feel that its light, but I also feel that this is a low risk project. Thus, I have mixed feelings. However, it probably better to have a large risk registry where few if any risks occur than a thin one that has most of them occur.

Lesson learned; review the submitted project plans for other students who have completed the program. I reviewed a few, but I should have done a more thorough analysis.

Stakeholder Management

It was as difficult as expected to keep and maintain the stakeholder's involvement in the project. They are all busy people, with lives that don't always match up with mine. Email and text messaging worked, but it was much better to get participation from the stakeholders face-to-face.

Lesson learned: Increase the number of planned face-to-face interactions with stakeholders rather than relying on email or texting.

Final Presentation

I have spent a lot of time worrying about the presentation. I have made several drafts that varied wildly and I'm still not sure if the one that I submitted hits the mark. I wanted to stay far away from the more traditional style of "my name is, this is my project, here's the risk reg..." and make it a more interesting and engaging presentation but I worry that I have gone too far from the expected and may lose points.

Lesson Learned; I think a thorough review of other student's presentations, which are posted on blackboard, would have been helpful before drafting the presentation. Watching them know, I feel better about going forward with my decision, but watching them before drafting my presentation would have saved me all the worry. While worry may not translate into schedule slippage, it would have made the last week or two less stressful.

In addition, having Crissy watch me and a couple of other students really helped. It may be beneficial for future students to have an organized opportunity to practice presenting in front of an audience and get feedback to help where ever they are having issues.

Feedback on Oral Defense

I completely missed impacts and the business case for my project. I also ended 3 minutes early. That's just leaving money on the table.

I was too nervous, and I need to make sure that the next presentation has clear linkage to impacts and the business case. I have to be explicate otherwise I'll repeat the same mistake.

Lesson learned: Impact, Impact, Impact. What is the impact?!?! It's a story of impact, not a narrative of what I did this last year. Those bits have to be woven into the impact.

Cross comparison of Greek festivals in US and Canada 2015

City/State	Church name	State	Dates	Days	Ticket price	Mission/ Goal	Years n Opens	Church tours	Dancing	Live Band	Vendors	Volunteers	Sponsorships	# of visitors	Greek coffee	Baklava cost	Gyro cost	Mousaka Co	Pastitsio	Other	Email	Phone	Date pull date	Website
Fort Lauderdale, Florida	Demetrios St.	FL	February 6-8, 201	3	\$ 5				y	n	y	y			\$ 3		\$ 8	\$ 12	\$ 12	greekfestiva	761		1/27/2016	fortlauderdalegreekfestival.org
Naples, Florida	Katherine St.	FL	February 6-8, 201	3	\$ 5	Raise money for children's charity		y	y	y	y									Has drive thru	office@stkat	(239) 5	1/27/2016	stkatherine.net
Peoria, Arizona	Haralambos St. Stefanos	AZ	February 6-8, 201	3	\$ 3		29	y	y	y										Loukoumade eating contest	office@sthai	(623) 4	1/27/2016	peoriagreekfest.com
St. Petersburg, Florida	Greek St. George	FL	February 20-22, 2	3				y	y						\$ 2	\$ 2	\$ 6	\$ 10	\$ 10		office@stste	(727) 3	1/27/2016	ststefanos.org
Palm Desert, California	Church St. Barbara	CA	February 21-22, 2	3	\$ 3		20	y	y	y							\$ 7		\$ 13		info@pdgree	(760) 5	1/27/2016	www.pdgreekfest.org
Orange, Connecticut	Greek	CO	Sept 4-7	4	free		34	y	y						\$ 2	\$ 3	\$ 8	\$ 10	\$ 9		office@saint	(203) 7	1/27/2016	saintbarbara.org
Bakersfield, California	St. George St.	CA	Oct 15-16	3	\$ 5				y	y											festival@ou	(661) 3	1/27/2016	stgeorgebakfield.org/Greek-food-festival/
Chandler, Arizona	Katherine	AZ	Oct 2-4	3	\$ 3			y	y	y											skladiis@cox	+1 480	1/27/2016	atasteofgreecaz.com
Bethlehem, Pennsylvania	St. Nicholas	PA	Sept 18-20	3				y	y	y						\$ 3	\$ 7	\$ 12	\$ 12		secretary@s	610.86	1/27/2016	https://www.facebook.com/events/1629045367371852/
Bethlehem, Pennsylvania	St. Nicholas Holy Trinity	PA	May 3-9, 2015	7																	secretary@s	610.86	1/27/2016	https://www.facebook.com/events/1426325590968278/
Charleston, South Carolina	Greek St.	SC	May 8-10, 2015	3	\$ 5		46				y										office@pocharleston		1/27/2016	charlestongreekfestival.com
Memphis, Tennessee	ResphGs St. John the	TN	May 8-9, 2015	2			57	y	y	y	y			10000						Drive thru	annunciator	(901) 3	1/27/2016	memphispagreekfestival.com
Webster, Texas	Theologian	TX	May 9-12, 2015	4			22	y			y				\$ 2					Togo fun run	smountakos	832.86	1/27/2016	clearlakegreekfestival.com
Piscataway, New Jersey	St. George Transfigurati	NJ	May 14-17, 2015	4	\$ 2		42	y												Refugee clothing drive	greek.festiva	(732) 4	1/27/2016	facebook.com/StGeorgePwayGreekFest
Florence, South Carolina	on of Our	SC	May 14-17, 2015	4			33	y	y	y	y						\$ 9	\$ 12					1/27/2016	florencegreekfestival.com
Greenville, South Carolina	St. George	SC	May 14-17, 2015	4	\$ 1			y	y	y											cjoiner@ear	864.23	1/27/2016	http://www.stgeorgegreenville.org/GreekFestival.html
Nashua, New Hampshire	St. Phillip Assumption	NH	May 15-16, 2015	3	free				y	y											office@stph	603-88	1/27/2016	stphilipn.org/events/festival/
Long Beach Greek Festival	of the Prophet	CA	Sept 5-7	3	\$ 3		66	y	y	y	y											(562) 4	1/27/2016	http://www.lbgreekfest.org/
Santa Cruz, California	Elias Greek	CA	Sept 9-11	3	free					y		y	y								welcome@li	831.42	2/2/2016	http://www.livelikeagreek.com/events/sc-greek-festival
Wilmington, North Carolina	St Nicholas	NC	May 15-17, 2015	4	\$ 3	Charity partner	23				y	y	y	15000							office@stnic	+1 910	2/2/2016	stnicholasgreekfest.com
Winston Salem, North Carolina	Ee. CksethN Annunciatio	NC	May 15-17, 2015	4	\$ 1	10% goes to Children's hospital	58?	y	y	y							\$ 6	\$ 13	\$ 13	Take out phone #	jeejuno@gm	(336) 7	2/2/2016	http://www.wsgoc.org/greek-festival/
Little Rock, Arkansas	n Greek Saint Sophia	AR	May 15-17, 2015	4		children and family charities	30	y	y											Drive thru		501-221-	2/2/2016	greekfoodfest.com
Washington, District of Columbia	Greek Holy Trinity	DC	Oct 9-11	3				y	y	y	y										office@saint	(202) 3	2/2/2016	saintsophiadc.com/ministries/volunteer/Greek-festival/
Jackson, Mississippi	St. John the Holy Trinity	MI	May 15-17, 2015	3				y	y	y	y				\$ 2	\$ 2	\$ 8			to-go and deliver		601-35	2/2/2016	greekfestjackson.org
Camp Hill, Pennsylvania	Greek Greek	PA	May 15-17, 2015	3	free	Philotochos (Friends of the Poor) v	43	y	y	y							\$ 6			take out	secretary@holyltrini		2/2/2016	pagreekfest.com
Oakland, California	Orthodox Annunciatio	CA	May 15-17, 2015	3	\$ 6			43	y	y	y											510-53	2/2/2016	oaklandgreekfestival.com
Elkins Park, Pennsylvania	n/Evangelis Nativity or	PA	May 21-24, 2015	4			38	y	y	y	y	y			\$ 3	\$ 3	\$ 7	\$ 13	\$ 12	rides for kids	office@ann	(215)6	2/2/2016	www.annoc.org/news
Marin County, California	Christ St. Anna	CA	May 22-24, 2015	3	\$ 5	5% profits go to St. Vincent's school for b y			y		y				\$ 3	\$ 3	\$ 8	\$ 6	\$ 6				2/2/2016	http://nativityofchrist.org/festival/
Roseville, California	Parish	CA	May 22-24, 2015	3	\$ 3				y	y	y	y										916-77	2/2/2016	festival.saintanna.org
Valley Greek Festival, California	Greek orthodox	CA	May 23-25, 2015	3	\$ 3		42	y	y	y	y	y								drawing for trip for 2 to Greece 1 mile/ 5k races and togo Sunday w/ togo contest			2/2/2016	valleygreekfestival.com
New Orleans, Louisiana	St	LO	May 23-25, 2015	3	\$ 7		43	y	y	y	y											504-28	2/2/2016	greekfestnola.com
Annapolis, Maryland	Constantine Holy Trinity	MD	May 28-31, 2015	4	free				y	y	y	y				\$ 3	\$ 8	\$ 8	\$ 8				2/2/2016	annapolisgreekfestival.org
Westfield, New Jersey	Greek Saints	NJ	May 28-31, 2015	4	FREE	WIT Children's specialized hospital/ World Tra		y	y	y	y	y		12000							opkyritsis@aol.com		2/2/2016	njgreekfest.com
Richmond, Virginia	Constantine Sts.	VA	May 28-31, 2015	4	Free	Elijah house, Homeless shelter, C2 z	40	y	y	y							\$ 8	\$ 15	\$ 15	Drive thru			2/8/2016	greekfestival.com
Boise, Idaho	Constantine Saint	ID	May 29-30, 2015	2	\$ 1		34	y	y	y	y				\$ 3	\$ 7		\$ 7					2/8/2016	boisegreekfestival.com
Hempstead, New York	Nicholas	NY	May 29-30, 2015	2	free																	516.48	2/8/2016	festival.stpaulhempstead.org
San Jose, California	Va. Gs vlaho Holy trinity	CA	May 29-31, 2015	3	\$ 5			y	y	y													2/8/2016	sanjosegreekfestival.org
Bridgeport, Connecticut	Greek	CO	May 29-31, 2015	3																	Email@Holy	203.37	2/8/2016	www.holytrinitybridgeport.org
San Luis Obispo, California	K. Ifi cLJ, All Saints Greek St.	CA	May 30-31, 2015	2	free				y	y	y							\$ 4	\$ 4		gerakaris@c	805.54	2/8/2016	greekfestivalslo.com
Canonsburgh, Pennsylvania	Greek St.	PA	June 1-6, 2015	6																	office@alisa	(724) 7	2/9/2016	allsaintschg.org
Brooklyn, New York	Constantine Holy Trinity	NY	June 1-6, 2015	6			38				y	y										718.62	2/9/2016	stconstantinecathedral.org
Wilmington, Delaware	of Delwar St.	DE	June 2-6, 2015	5			40	y	y	y										Online ordering, app			2/9/2016	greekfestde.com
Canton, Ohio	Haralambos	OH	June 4-6, 2015	3				y	y	y					\$ 4	\$ 2	\$ 6	\$ 8	\$ 8				2/9/2016	cantongreekfest.com
Egg Harbor Township, New Jersey	Holy trinity	NJ	June 4-7, 2015	4	\$ 1		31									\$ 3	\$ 8	\$ 12	\$ 12	child care center, fireworks display	lisa@cmmcw.com		2/9/2016	thegreekfestival.info

	City, State	Church name	State	Dates	Days	Ticket price	Mission/ Goal	Years n Opera	Church tours	Dancing	Live band	Vendors	Sponsorships	# of visitors	Greek coffee	Baklava cost	Gyro cost	Moussaka Co	Pastitsio	Other	Email	Phone	Date pull date	Website	
		Va.																							
	Randolph, New Jersey	Gadcoye St spyridon	NJ	June 5-7, 2015	3				y	y	y	y						\$ 12	\$ 12				2/9/2016	biggreekfestival.com	
	San Diego, California	Greek	CA	June 5-7, 2015	3	\$3 donation		46	y	y	y										office@stspyridon.org		2/9/2016	sdgreekfestival.com	
	Lincoln Park, Illinois	St George St.	IL	June 5-7, 2015	3	donation provides go to st George church			y	y	y										lincolnparkg (773)		2/9/2016	lincolnparkgreekfest.com	
	Arlington, Massachusetts	Athanasius	MA	June 4-7, 2015	4	free			y	y	y			15000	\$ 2	\$ 3	\$ 9	\$ 12	\$ 12				2/9/2016	arlingtonfestival.com/grecian-festival/	
	Ann Arbor, Michigan	St. Nicolas	MI	June 5-7, 2015	3	\$ 3 SOS community services		10	y	y	y		y										2/9/2016	annarborgreekfestival.org	
	Downey, California	St George	CA	June 3-5, 2016	3			31	y	y										Increased length by day 2016. Lamb on spit.	DowneyGrec (562) 8		2/9/2016	facebook.com/DowneyGreekFest	
	Durham, North Carolina	St Barbara	NC	June 6-7, 2015	2	free	St Barbara fund and Durham Rescue mission		y	y	y	y	y							Kids bounce house. Free dance lessons	info@durhamgreekf		2/9/2016	durhamgreekfestival.org	
	Pittsburgh, Pennsylvania	Holy Cross	PA	June 10-13, 2015	4			44	y	y	y	y			\$ 2	\$ 7	\$ 6	\$ 6		ATM on site. Credit cards accepted.		(412) 8	2/9/2016	pittsburghgreekfestival.org	
	Syracuse, New York	St. Sophia	NY	June 11-14, 2015	4				y	y					\$ 8	\$ 9	\$ 9						2/9/2016	syracusegreekfest.com	
	Halifax, Nova Scotia - Canada	Prophet Elias	Canada	June 11-14, 2015	4	\$ 5		30	y	y			y							Win trip for 2 to Greece. Wine tasting with Sommelier	info@greekfest.org		2/9/2016	greekfest.org	
	Inland Empire, California	Prophet Elias	CA	June 13-14, 2015	2	\$ 2																	2/9/2016	iegreekfest.com	
	Denver, Colorado	of the Theotokos	CO	June 19-21, 2015	3	\$ 5	Bonfils bllod center, Denver Health foundation	50	y	y	y		y		\$ 4	\$ 7		\$ 3	1/\$1.	blood drive on sat. buy coins		(303) 3	2/9/2016	thegreekfestival.com	
	Calgary, Alberta, Canada	Hellenic Community Center	Canada	June 19-21, 2015	3		Kids Cancer care, CA red Cross			y	y		y	y						App. Lok easting contest. To go ordering online	admin@calg (403) 2		2/9/2016	http://www.yycgreekfest.com/	
	Milwaukee, Wisconsin	n Greek St.	WI	June 19-21, 2015	3	free		50													Greekfestmke@gmail		2/9/2016	facebook.com/MkeGreekFest	
	Ventura County, California	Demetrios	CA	June 26-28, 2015	3	\$ 3	construction of new church	38	y	y	y												2/10/2016	http://vcgreekfestival.org/	
	Irvine, California	St. Paul	CA	June 26-28, 2015	3	\$ 3		38	y	y	y									Learn some Greek.			2/10/2016	irvinegreekfest.com	
	Portland, Maine	Holy Trinity	ME	June 25-27, 2015	3							y		10000							gtselikis@aoc (207) 7		2/10/2016	holytrinityportland.org/festival.asp	
	Palatine, Illinois	St. Nectarios	IL	June 26-28, 2015	3	\$ 3						y	y		\$ 10		\$ 7		Drive thru		(847) 3		2/10/2016	stnectariosgoc.org/Greek-fest-home-page/	
	Oakmont, Pennsylvania		PA	June 26-28, 2015	3	free																	2/10/2016	dormitionpgh.org	
	Vancouver, British Columbia - Canada	St. Nicholas & Dimitris	Canada	June 26 - July 6, 2015	10	free	supported Saints Nicholas and Dimitris Greek Orthodox Church, St. John Ambulance, Collingwood Neighborhood House, BC Children's Hospital, Vancouver Fire	28	y	y	y		y	y	40000	\$ 2	\$ 4	\$ 7		10 days long.	volunteer@vancouv		2/10/2016	vancouvergreeksummerfest.com	
	Jersey Shore, New Jersey	St. George	NJ	June 26-28, 2015	3	\$ 2	Local charities: Health center, pet therapy, historical society, MS society,	83	y	y	y	y	y	8000							info@jersey shoregreekfestival.com	732-775-2777		2/10/2016	jerseyshoregreekfestival.com - Ocean, New Jersey
	Adirondack, New York	Antiochian Orthodox	NY	July 10-12, 2015	3	free		6	y											food, dancing and music			2/10/2016	sgforthodoxchurch.com	
	South Bay, California	St. Katherine HOLY TAXIARHAI & ST. St.	CA	July 10-12, 2015	3	\$ 2		50		y			y							lamb lollipops things on grill. Volunteer t shirts	sbgreektfest@ +1 310		2/10/2016	sbgreektfestival.com	
	Greek Fest on Niles Illinois		IL	July 10-12, 2015	3					y	y									face painting, moon bounce, free activates for kids			2/10/2016	http://www.biggreekfoodfestofniles.org/	
	Vallejo, California	Constantine	CA	Sep 12&13	2	\$ 2	Proceeds go to church		y	y	y										707-64		2/16/2016	stscab.com/gyro-fest-2015/	
	Santa Fe, New Mexico	St. Elias	NM	July 12-13, 2015	2	\$ 3				y	y	y			\$ 3	\$ 2	\$ 8	\$ 8		tickets instead of cash	passionilvin (505) 7		2/16/2016	santafegreekfestival.com	
	Ambridge, Pennsylvania	Holy Trinity	PA	July 14-18, 2015	3											\$ 6	\$ 4	\$ 4					2/16/2016	htgoc.org	
	Hamptons, New York	Dormition of	NY	July 16-19, 2015	4	free				y	y	y	y	10000	\$ 5	\$ 8	\$ 10	\$ 10		dance practice open to all youth. Sell ads in journal. Take out.	info@kimisi 631 28		2/16/2016	hamptongreekfestival.com	
	Missoula, Montana		MT	July 17-18, 2015	2	free		3	y	y	y		y							Started planning Feb 1. Bounce house.			2/16/2016	facebook.com/MontanaGreekFestival	
	Cape Cod, Massachusetts		MA	July 17-19, 2015	3							y								Website: More data later			2/16/2016	stgeorge-capecod.com	
	Portsmouth, New Hampshire	St Nicholas	NH	July 17-19, 2015	3	\$ 3		41	y	y	y		y								stnickport@ (603) 4		2/16/2016	portsmouthgreekfestival.com	
	Santa Barbara, California		CA	August 1-2, 2015	2	free		42	y	y			y							Dance contest			2/16/2016	santabarabragreekfestival.org	
	Taste of the Danforth by GreekTown Toronto, Ontario - Canac		Canada	August 7-9, 2015	3	Free		22						1.6M						Street festival in Greek Town			2/16/2016	tasteofthedanforth.com	
	Ottawa, Ontario - Canada		Canada	August 13-23, 2015	11	free			y	y	y		y	y							adminassists 613-22		2/16/2016	ottawagreekfest.com	

City, State	Church name	State	Dates	Days	Ticket price	Mission/ Goal	Years n Opera	Church tours	Dancing	Live Band	Vendors	Volunteers	Sponsorships	# of visitors	Greek coffee	Baklava cost	Gyro cost	Mousakia Co	Pastitsio	Other	Email	Phone	Date pull date	Website
Hamilton, Ontario - Canada Greek Fest	Presentatio n Of Christ St. Spyridon Greek	Canada	August 14-16, 201	3		Give back to community, promote cultural diversity	30			y	y	y								kids soccer match. Belly dancing.	hamiltongre	905.38	2/16/2016	hamiltongreekfest.com
East Pittsburgh, Pennsylvania Greek Festival	PA	PA	August 20-23, 201	4	free		32	y	y														2/16/2016	greekburgh.com
Monessen, Pennsylvania Greek Festival	PA	PA	August 21-22, 201	2				y	y														2/16/2016	stspyridon.com
Castro Valley, California Greek Festival	CA	CA	August 21-23, 201	3	Free	immerse in Hellenic culture	44	y	y	y										Festival tokens instead of cash. Cash/Credit too.		(510) 5	2/16/2016	greekfestival.me
Anchorage, Alaska Greek Festival	Holy Transfig	AK	August 21-23, 201	3			21	y	y	y	y									Sells cookbook.			2/16/2016	akgreekfestival.com
Reno, Nevada Greek Festival	St. Anthony + NV assumption of the virgin Mary	RI	August 21-23, 201	3			40	y	y		y									photo booth. Chicken wings. Bounce house. Twitter feed on website.			2/17/2016	renogreekfest.com
Pawtucket, Rhode Island Greek Festival	RI	RI	August 21-23, 201	3			88	y			y									climbing wall, face painting,	info@GreekFestival		2/17/2016	assumptionri.org/GreekFestival/
Victoria, British Columbia - Canada Greek Festival	Canada	Canada	August 21-23, 201	4		School kids hot lunch program		y	y		y	y			\$ 3	\$ 4	\$ 8			Zumba, dancing lessons, logo contest, Byzantine chant			2/17/2016	greekfest.ca
Fresno, California Greek Festival	St. George G	CA	August 28-30, 201	3	\$ 6		55	y	y	y	y			30000	\$ 3	\$ 2	\$ 7	\$ 6	\$ 5	recitals in church, water slide,	info@fresnogreeke		2/17/2016	fresnogreekfest.com
Indianapolis, Indiana Greek Festival	IN	IN	August 28-30, 201	3	Free			y	y	y						\$ 2	\$ 8		\$ 15	major credit cards accepted, selfie station, puppet show, face painting, has recycling,			2/17/2016	indygreekfest.org
Honolulu, Hawaii Greek Festival	HI	HI	August 29-30, 201	2	\$ 3							y								Photo / lecture with Dr on holy sites, sells cookbook,	info@greekf	(808) 5	2/17/2016	greekfestivalhawaii.com
Charlotte, North Carolina	Holy Trinity C	NC	September 3-6, 201	4	\$ 3		38	y	y	y										tour, worriers of Greece reenactment group : live Spartan		(704) 3	2/17/2016	yiasoufestival.org
Monterey, California Greek Festival	CA	CA	August 4-5, 2015	2	free		30	y	y	y	y	y			\$ 3	\$ 4	\$ 8	\$ 9	\$ 8		greekfestiva	(831) 4	2/17/2016	http://mbgreekfestival.com/
Dover, New Hampshire Greek Festival	Annunciatio n Greek Orthodox	NH	September 4-5, 201	2	free	Local charities; Dover Children's home, Policy charity and more		y			y	y											2/17/2016	dovergreekfestival.com
Minneapolis, Minnesota Greek Festival	St Mary	MN	September 4-6, 201	3	free	St. Nicolas national shrine, Choles fight rare desesea foundation, Joyce food shelf		y	y	y	y					\$ 2	\$ 7		\$ 9	Tickets for food. \$1=1 ticket. Greek dance demos. Mount Athos monastic presentation. Toga 5k fun run/walk			2/18/2016	mplsgreekfest.org
Kansas City, Missouri Greek Festival	Annunciatio n	MO	September 4-6, 201	3		Friends of poor charity to distribute to local charities excellent Greek foo, fun and entertainment	54	y	y	y						\$ 3	\$ 6		\$ 6	Saganaki. Has guide book.			2/18/2016	greekfoodfest.org
Cranston, Rhode Island Greek Festival	RI	RI	September 4-6, 201	3			30	y	y	y							\$ 8		\$ 8	Blood drive. Gift cards available.	office@annu	(401) 9	2/18/2016	https://www.facebook.com/CranstonGreekFestival/
Nashville, Tennessee Greek Festival	TN	TN	September 4-6, 201	3	\$ 3		28	y	y	y	y				\$ 2	\$ 3	\$ 6	\$ 9	\$ 9	Pre-order baked gods.	info@nashvi	(615) 3	2/18/2016	nashvillegreekfestival.com
Sacramento, California Greek Festival	CA	CA	September 4-6, 201	3	free		53	y	y											Learn to speak Greek (for travel). Dance contest.		(916) 4	2/18/2016	http://sacramentogreekfestival.com/
Columbus, Ohio Greek Festival	Annunciatio n	OH	September 4-7, 201	4	\$ 5		44	y	y	y				40000						Hellenic singers. Live video feed of church.	festivalinfo @greekcath edral.com	(614) 224-9020	2/18/2016	columbusgreekfestival.com
Belmont, California Greek Festival	Church of th	CA	September 5-7, 201	3	\$ 5		45	y	y	y	y									Has food tickets.			2/24/2016	goholycross.org/festival/
Long Beach, California Greek Festival	Assumption	CA	September 5-7, 201	3	\$ 3	Community celebration of Hellenic culture.	66	y	y	y	y									Has dimples. And carnival area for kids			2/24/2016	lbgreektfest.org
Bellingham, Washington Greek Festival	St. Sophia	WA	September 10-13,	4	free															Takes credit cards at token booth.			2/24/2016	bellinghamgreekfest.org
Braintree, Massachusetts Greek Festival	St. Catherine Saints Constantin e and Helen	MA	September 10-13,	4												\$ 3	\$ 8	\$ 14	\$ 14	Has take out.		781-843-	2/24/2016	stcatherinebraintree.org/events/festival
Antelope Valley, California Greek Festival	CA	CA	September 11-13,	3	\$ 3			y	y	y	y									Friday. Shark slide and pirate ship inflatables. Marionette show			2/24/2016	avgreekfest.com
Cardiff by-the-Sea, California Greek Festival	St. Constantine and Helen	CA	September 12-13,	2	\$ 3		37	y	y	y										Market. Mercedes car raffle (tickets \$10!). Photo booth with name, and a stuffed donkey to hold. Greek games- golf, ect		760.942.0920	2/24/2016	http://www.cardiffgreekfestival.com/
Los Angeles, California Greek Festival	St. Sophia	CA	September 11-13,	3	\$ 5		17	y	y	y	y				\$ 3	\$ 3	\$ 9	\$ 12	\$ 12	Buy tickets online.		(323) 737-	2/24/2016	http://www.lagreekfest2015.com/
Stockton, California Greek Festival	St. Basil	CA	September 11-13,	3	\$ 2		57														smvox.net@	(209) 4	2/24/2016	facebook.com/GreekFoodFestivalStocktonCA
New Castle, Pennsylvania Greek Festival	St. George	PA	September 11-13,	3																Gyro on spike.		(724) 6	2/24/2016	facebook.com/...

City, State	Church name	State	Dates	Days	Ticket price	Mission/ Goal	Years n Opera	Church tours	Dancing	Live band	Vendors	Sponsorships	# of visitors	Greek coffee	Baklava cost	Gyro cost	Moussaka Co	Pastitsio	Other	Email	Phone	Date pull date	Website
Salt Lake City, Utah Greek Festival	St. Katherine	UT	September 11-13,	3	\$ 3	Supports Community Care of St. Catharine's and Thorold	40	y	y	y	y								Hellenic cultural museum. Website in English and Greek.			2/24/2016	saltlakegreekfestival.com
Niagara, St. Catharine's, Ontario - Canada Greek Festival	Katherine	Canada	September 11-13,	3							y	y		\$ 4					Raffle for trip for two to Greece			2/24/2016	niagaragreekfestival.com
Fayetteville, North Carolina Greek Festival	Saints Const	NC	September 11-13,	3			25												Win a trip to Athens raffle			2/24/2016	stsch.nc.goarch.org
Raleigh, North Carolina Greek Festival	Holy trinity	NC	September 11-13,	3	\$ 3	Habitat for Humanity			y	y	y			\$ 3	\$ 3	\$ 7	\$ 11	\$ 11	takes credit cards. Has app.	greekfestiva	919.78	2/24/2016	greekfestivalraleigh.com
Santa Cruz, California Greek Festival	Profit Elias	CA	September 11-13,	3	free				y	y	y	y		\$ 3	\$ 3	\$ 8	\$ 6	\$ 6				2/24/2016	http://www.livelikeagreek.com/events/sc-greek-festival
Flemington, New Jersey Greek Festival	St. Anna St.	NJ	September 11-13,	3	entrance	St Nicolas shrine at 9/11, 49 Rescue squad	11	y		y	y	y		\$ 2	\$ 4	\$ 7	\$ 14	\$ 12	Memorial services for 9/11 victims. Lecture on Orthodox.	info@opafestival.co		2/24/2016	opafestival.com
Sarnia, Ontario - Canada Greek Festival	Demetrios	Canada	August 7-9, 2015	2	free				y		y	y							Belly dancers. And a DJ.	info@sarnia	519-38	2/24/2016	http://sarniagreekfest.com/
Los Altos, California Mediterranean Festival	Church of	CA	September 12-13,	2	\$ 4		32															2/24/2016	https://www.facebook.com/events/167914743394919/
Columbia, South Carolina Greek Festival	Holy trinity	SC	September 17-20,	4		Columbia's Greek Festival Committee gave \$50,000.00 in donations to charities across the midlands	30	y	y	y	y								Ancient Greek hoplite warriors. AESOP fables theater.	cnmiller@us	803.461.0248	2/24/2016	columbiagreekfestival.com
Contra Costa County, California Greek Festival	St. Demetrio's	CA	September 18-20,	3	Free	10% proceeds go to local charities.			y	y									wine tasting.		925.67	2/24/2016	cckgreekfest.com
San Francisco, California Greek Festival	Annunciatio	CA	September 18-20,	3					y	y									Postcard with free admission on it.	festival@an	(415) 8	2/24/2016	sfgreekfestival.org
Tulsa, Oklahoma Greek Festival	Holy Trinity	OK	September 17-19,	3	\$ 3				y	y			Apr-00								918-58	2/24/2016	tulsagreekfestival.com
Cheyenne, Wyoming Greek Festival	Constantine and Helen	WY	September 18-19,	2		Friday Food Bag Foundation - lunch to kids	29		y	y		y							Raffle: Trip to Greece	Office@Che	(307) 6	2/24/2016	cheyennegreekfestival.org
Greensboro, North Carolina Greek Festival	Dormition of	NC	September 18-20,	3	\$ 1				y	y				\$ 2	\$ 7				Express take out			2/24/2016	dormition.nc.goarch.org/Greek-festival
Modesto, California Greek Festival	Annunciatio	CA	September 19-20,	2	\$ 14				y	y	y								Ticket included meal, dessert . Coffeehouse.			2/24/2016	goannunciation.org
Pasadena, California Greek Festival	St. Anthony Greek	CA	September 19-20,	2	\$ 4		56					y								info@pasad	(626) 4	2/24/2016	pasadenagreekfest.org
Roanoke, Virginia Greek Festival	Holy Trinity	VI	September 19-21,	3		Festival sponsors marathon/ half that raises money for many local charities Supports charities: Magic Moments, The Bell Center, The Exceptional Foundation, The Ronald McDonald House, The Fire	10	y	y	y	y	y				\$ 14	\$ 14		Drive thru			2/25/2016	roanokegreekfestival.com
Birmingham, Alabama Greek Festival		AL	October 1-3, 2015	3			43	y	y	y		y		\$ 2	\$ 8		\$ 11		Take out		(205) 7	2/25/2016	http://www.birminghamgreekfestival.net/
Elk Grove, California Food Festival	ST. Katherine	CA	September 25-27,	3					y	y									Website down until 2016 prep complete Dance class. Greek dance costumes on dolls? Sports bar w/ satellite tv			2/25/2016	https://www.facebook.com/EGGreekFestival/
San Juan Capistrano, California Greek Festival	St. basil	CA	September 25-27,	3	Free			y	y	y	y	y									(949) 5	2/25/2016	sjcgreekfest.org
Wyckoff, New Jersey Greek Festival	St. Nicolas	NJ	September 25-27,	3	free			y	y	y												2/25/2016	Festival Flyer
Spartanburg, South Carolina Greek Festival	St. Nicolas	SC	September 25-27,	3		Mobile meals and Hope Center for Children		y	y	y		y		\$ 2	\$ 2	\$ 6	\$ 13	\$ 13	Hellenic event center. Free admission ticket on website.			2/25/2016	stnicholasgoc.org/spartanburg-Greek-festival/
Knoxville, Tennessee Greek Festival	St. George St.	TN	September 25-27,	3	\$ 2		36	y	y	y		y		\$ 2	\$ 3	\$ 7	\$ 6	\$ 6	Pita pizza.	stgeorgeknox	865.52	2/25/2016	greekfesttn.com
Tucson, Arizona Greek Festival	Demetrios	AZ	September 25-28,	4															Website no operational Visa and MasterCard accepted. Face painting and bounce house. Dimples! 3 different bands, and 2 DJs			2/25/2016	tucsongreekfest.com
Boston, Massachusetts Greek Festival		MA	September 26-28,	3	free			y	y	y	y				\$ 9	\$ 12	\$ 12	\$ 12		acoffice@ve	617.73	2/25/2016	http://www.bostoncathedral.org/greekfest.html
Oklahoma City, Oklahoma Greek Festival	St. George	OK	September 26-28,	3		Proceeds go to ministries, community outreach and youth programs													Website has countdown to 2016	chris@greek	(405) 8	2/25/2016	greekfestokc.com
Dallas, Texas Greek Festival	Holy Trinity	TX	September 26-28	3			59	y	y	y	y	y							Website has rules page.		972-23	2/25/2016	greekfestivalofdallas.com
Huntington, West Virginia Greek Festival	St. George St. John the Baptist Greek Orthodox Church	WV	September 26-28	3				y	y										Has Mythos!		304-52	2/25/2016	www.stgeorgehvv.org/festival/
Las Vegas, Nevada Greek Festival		NV	October 1-4, 2015	4	\$ 6		43	y	y	y			30000	\$ 2					BMW raffle (tix \$100). Pre-order pastries. Rock climbing tower, other rides. Souvenir magazine ad sales.	info@lasveg	(702) 2	2/25/2016	lasvegagreekfestival.com
Houston, Texas Greek Festival	Annunciatio	TX	October 1-4, 2015	4	\$ 5		49	y	y	y				\$ 3	\$ 2	\$ 9	\$ 14	\$ 14	Pastitsio made with mac. Recycled 10,000 lbs.			2/25/2016	greekfestival.org
Tallahassee, Florida Greek Festival	Holy Mother	FL	October 2-3, 2015	2				y	y	y		y		\$ 3		\$ 7	\$ 7	\$ 10	Guidebook online- has simple recipes, sponsors and other info.			2/25/2016	hmog.org/festival/

	City, State	Church name	State	Dates	Days	Ticket price	Mission/ Goal	Years n Opera	Church tours	Dancing Live Band	Vendors	Volunteers Sponsorships	# of visitors	Greek coffee	Baklava cost	Gyro cost	Moussaka Co	Pastitsio	Other	Email	Phone	Date pull date	Website
San Gabriel Valley, California Greek Festival	St. Nectarios	CA	October 2-4, 2015	3	\$	2		Y	Y	Y	Y	Y							Free admission tickets online. Saginaki severed. Dance instruction.	(626) 9	2/25/2016	sgvgreekfestival.org	
Chandler, Arizona Fall Greek Festival	St. Katherine	AZ	October 2-4, 2015	3		St. Kathrine church and philanthropic activities and community charities			Y	Y	Y	Y									2/25/2016	atasteofgreeceaz.com	
Albuquerque, New Mexico Greek Festival	St. George	NM	October 2-4, 2015	3	\$	1		Y	Y	Y	Y	Y		\$ 3	\$ 2	\$ 7		Tickets to buy everything. 1 tix=\$1		(505)-2	2/25/2016	abagreekfest.com	
Portland, Oregon Greek Festival	Holy Trinity	OR	October 2-4, 2015	3		Pay off mortgage	60	Y					15000	\$ 2				Tickets for buying. Tix= \$1. Face painting, coloring, games for kids. Raffle trip to Greece(\$2500 gift card to travel agency). \$10 access to kid zone: Carnival games, bounce house, face painting. Arts and Culture exhibit. Grill whole Octopus.			2/25/2016	portlandgreekfestival.com	
Riverside, California Greek Festival	St. Andrew	CA	October 2-4, 2015	3	\$	5		Y	Y	Y	Y	Y									2/25/2016	riversidegreekfest.com	
Yuba City, California Greek Festival		CA	October 3, 2015	1	\$	5	Sutter Performing Arts Center, Hands of Hope	7				Y						Belly dancing. Take home boxes. Face painting.		1-530-4	2/25/2016	yubasuttergreekfoodwinefestival.com	
Washington, District of Columbia Greek Festival	St. Sophia	DC	May 16-18, 2015	3		Rebuilding of St. Nicolas shrine at 9/11												Mercedes raffle tickets(\$100) or \$40K. ATM on site.	office@saint	202.33	2/25/2016	facebook.com/saintsophiadcgreekfestival	
Atlanta, Georgia Greek Festival	Annunciatio n	GA	September 24-27,	4				40	Y	Y	Y		Y					Drive thru. BMW raffle (\$100). Kids tent with arts/crafts/ face painting			2/25/2016	atlantagreekfestival.org	
Clearwater, Florida Greek Festival	Holy trinity	FL	October 9-11, 201	3					Y	Y	Y										2/25/2016	https://www.facebook.com/GreekFestClearwater/timeline	
Phoenix, Arizona Greek Festival	Holy trinity	AZ	October 9-11, 201	3	\$	3		55	Y	Y	Y		Y					Kid zone with rides.		602.26	2/25/2016	phoenixgreekfestival.org	
Saint Augustine, Florida Greek Festival	St Augustine	FL	October 9-11, 201	3	\$	3	Some proceeds go to wildflower clinic			Y	Y	Y	Y					Kid center with rides an games.	holy3goc@g	(904) 8	2/25/2016	stauggreekfest.com	
Seattle, Washington Greek Festival	St. Demetrio's	WA	October 9-11, 201	3	free	Miniseries and community outreach	55	Y	Y	Y		Y	Y					Accepts credit cards. 1 token= \$1; can exchange back for cash when you leave.		(206) 3	2/25/2016	seattlegreekfestival.com	
Corvallis, Oregon Greek Festival	St. Anne	OR	October 10-11, 20	2	free		12											Children's activates. Frozen dinners-to-go. Curb-side drive thru.			2/25/2016	staoc.com/Greek-food-festival/Greek-fest-activities	
Mobile, Alabama Greek Festival		AL	October 15-17, 20	3	\$	2		53	Y	Y	Y		Y								2/25/2016	greekfestmobile.org	
Bakersfield, California Greek Festival	St. George	CA	October 16-17, 20	2	\$	5			Y	Y	Y							Has Mythos.		(661) 3	2/25/2016	stgeorgebakfield.org/Greek-food-festival/	
Ambridge, Pennsylvania Greek Festival	Holy Trinity	PA	October 17-18, 20	2														Facebook site not set-up.			2/25/2016	facebook.com/events/358504390994945/	
Temecula, California Greek Festival	St. Nicolas	CA	October 17-18, 20	2	\$	2			Y	Y	Y									TemeculaGr	951) 2	2/25/2016	temeculagreekfest.com
Watkinsville, Georgia Greek Festival	St. Philothea	GO	October 25, 2015	1	\$	1		18	Y	Y	Y			\$ 3	\$ 7			Pre-order food for take home. 9x11" pans of Pastisio and Moussaka for \$25 each.			2/25/2016	stphilothea.ga.goarch.org/GFInfoNEW.htm	
Galveston, Texas Greek Festival	Assumption of Our Lord	TA	October 31 - Nov	2	\$	3		32										ATM onsite.			2/25/2016	galvestongreekfestival.com	
Tampa, Florida Greek Festival	Baptist Greek Orthodox Church	FL	November 6-8, 20	3	\$	2			Y	Y	Y		Y	Y	\$ 3		\$ 7	\$ 12	Raffle: \$25 first prize. Second trip to Athens. Takeout available. Sell food by frozen pan.		813.87	2/25/2016	tampagreekfestival.com

Capstone: Greek Festival Best Practices Guide

BY ALLISON MURRELL

Φεστιβάλ Ελληνικού Οδηγού Καλών
Πρακτικών

Με Allison Murrell



GREEK FESTIVAL BEST PRACTICES GUIDE, MURRELL, ALLISON

1

AGENDA

Background

Festival info

Problem

Why it matters

What and how are we going to fix
problem

Project docs



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2

Background- Greeks in Alaska

1900s- Large numbers of Greeks came to
build the railroad

First Greek Orthodox church organized in
1953

1958 Greeks built the first Orthodox
church in Anchorage

1970s/80s Oil boom brought in more
Greeks



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3

Festival Origins

Moved to a donated
house in 1987

1995 started Greek
Festival to raise funds for
traditional Byzantine style
church



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4

Festival proceeds enabled building of new church

2009 Groundbreaking
Ceremony for new
church

2014 new church held
its first service



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5

2015 Alaska Greek Festival



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6

What is the Alaska Greek Festival?

Annual event held on the Greek Orthodox church grounds

Two forms of cultural engagement

Culinary based

Activity based



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Greek Festival Mission

- Support the new church building project and operations;
- Provide opportunities for community engagement with Greek culture



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What is the problem?



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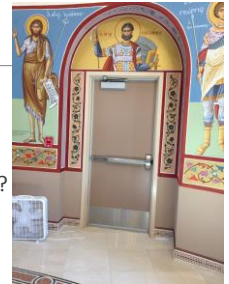
Change

Festival has operated for 20 years

Church is built, mostly

What is the purpose of the festival?

What are the needs of the Greek community?



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Constrained resources

- Limited space
- Limited parking
- Limited volunteers
- Limited donations
- Limited capacity



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11

Lack of data

You can't manage what you don't measure

- How many gyros were sold?
- How many people came to the festival?
- How many pitas should be ordered for next year?

TIME	EVENT
NOON (until closing)	LYFE GREEK MUSIC
12:30 PM	COOKING DEMONSTRATION
1:15 PM	CHURCH TOUR
2:00 PM	GREEK DANCE PERFORMANCE
3:00 PM	CHURCH TOUR
3:45 PM	GREEK DANCE PERFORMANCE
4:30 PM	COOKING DEMONSTRATION
5:15 PM	CHURCH TOUR
6:15 PM	GREEK DANCE PERFORMANCE
7 PM	GREEK DANCE PERFORMANCE

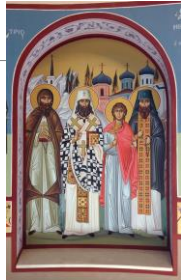
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12

Why? Reason for action

Enhances core principles of festival mission statement

- Raise funds
- Cultural engagement



Raise funds

New church built

- Still need icons
- Narthex doors
- Widen and pave road and parking



Cultural engagement

Internal

- Teaching next generation language and dance
- A place like home

External

- Inclusion in greater community with connection and understanding



What are we going to do?

Must have:

- Consistent policies and procedures
- Clear expectations
- Efficient resource usage

Final Document must be:

- Collaborative
- Useful
- Dynamic



SCOPE DESCRIPTION

The Greek Festival Best Practices Project must include the following:

- Research of Alaska Greek Festival
- Research of Other Greek Festivals in the US
- Create a Best Practices Guide that will include the following:
 - Initiation approval process
 - Planning procedures
 - Schedule management plan including a timeline for planning
 - Financial management plan for festival funds
 - Procurement management process
 - Stakeholder management plan
 - Communication plan for both volunteers, stakeholders and community
 - HR/ Volunteer management plan
 - Risk management process
 - Quality management process
 - Change management process
 - Set up procedures, including layouts, installation and management best practices
 - Clean up procedures
 - Close out procedures
- Copy of final Best Practice guide will be given to Festival Subcommittee and Festival Chairperson

Greek Festival Best Practices Guide

- Charter
- WBS/ Timeline
- Stakeholder Management Plan
- Festival Management Plan
- Volunteer Management Plan
- Quality Management Plan
- Change Management Plan
- Layouts and Installation Guidelines
- Clean up/ Close out procedures

Mechanism for strategic planning

Festival should start every year with

- Environmental scan
- SWOT Analysis
- Assessment of festival mission statement



Tools and techniques for resource efficiencies

Value stream mapping

- Process to find and eliminate waste
 - Find bottlenecks
 - Eliminate bottlenecks



Greek Festival Metrics

- Simple
- Accurate
- Meaningful



How?

- Research
- Collaboration



Research

Descriptive research

- 20 year history to go through

Literature review

- Festival management
- Event planning
- Greek festivals



Collaboration with Stakeholders

Key to project

- Buy in for project
- Knowledge and experience
- Alignment



Stakeholder Registry and Analysis

Name	Role	Communication form	Interest	Power
Allison Murrell	PM	Every way possible	4	4
Angelica Pournatzis	Chairperson	Meetings, Email	4	4
Bill Kapadis	President Parish Council	Email	4	4
Father Vasilios	P			
Committee	A Notes	Major Concerns		Relationship Manager
Parish	C Super awesome	Maintain pos relationships		Self
	Hard working rock stars	Project is done well		PM
	Very interested	Project is done well		PM
	Very supportive	Using project for other events		PM
	Supportive and involved	Completion of project		PM
	Interested, positive	Project helps/ is useful		PM

Schedule for Project

Capstone	154 days	\$2,870.00 Tue 9/1/15	Fri 4/1/16	27%
PM 080A	PM 080B	89 days	\$1,877.00 Tue 12/1/15	Fri 4/1/16
Admin	Research	24 days	\$180.00 Mon 12/1/15	Thu 3/7/16
Internal Review Board	Deliverables	61 days	\$960.00 Fri 1/8/16	Fri 4/2/16
Project Deliverables	PPM 1	16 days	\$128.00 Fri 1/8/16	Fri 1/29/16
Research Plan	PPM 2	20 days	\$160.00 Mon 2/1/16	Fri 2/26/16
PPM #1	PPM 3	15 days	\$120.00 Mon 2/29/16	Fri 3/18/16
PPM #2	PPM 4	10 days	\$80.00 Mon 4/2/16	Fri 4/2/16
PPM #3	Go/ No Go Phase Gate	0 days	\$0.00 Fri 4/1/16	Fri 4/1/16
Go/ No go Decision #1	Deliverables #1	14 days	\$72.00 Tue 2/16/16	Mon 3/7/16
PPM #4	Deliverable #2	14 days	\$72.00 Thu 2/21/16	Tue 2/9/16
Presentation	Deliverable #3	14 days	\$112.00 Wed 2/10/16	Mon 2/29/16
Draft	Deliverable #4	12 days	\$72.00 Tue 3/1/16	Wed 3/16/16
Edit	Deliverable #5	12 days	\$72.00 Thu 3/17/16	Fri 4/1/16
Final	Compile Guide	11 days	\$64.00 Thu 3/17/16	Thu 3/11/16
Present Presentation	Finalize guide	1 day	\$8.00 Fri 4/1/16	Fri 4/1/16
Submit Final Documents for Class	Presentation and Paper	10 days	\$425.00 Tue 12/1/15	Fri 4/2/16
	Submit Final Paperwork	0 days	\$0.00 Fri 4/1/16	Fri 4/1/16
	Project Complete	0 days	\$0.00 Fri 4/1/16	Fri 4/1/16

Upcoming Milestones

- 1/7/16 Research Completed
- 4/1/16 Finalized Guide Completed
- 4/1/16 Final Presentation (class)



Milestone Key Performance Indicator (KPI)

- 34% threshold

Project Risks

Biggest risks

- Stakeholder collaboration timing
- Keeping stakeholder agreeable



Risk Registry

Risk Statement & Category			Risk Analysis Matrix								Response Strategy & Re
Risk Statement	Risk Category		Risk Probability	Risk Impact		Quantitative Risk Impact				Risk Response Strategy	
	Initial Risk Owner	Risk May Occur In		Schedule	Cost	Schedule Score	Cost Score	Final Score	Schedule Impact (Days)		Cost Impact (\$)
Lack of access to documents	AM		2	4	1	8	2	10	1 month	\$ 50	Work with chair/subcommittee to get access
Lack of information online	AM		3	2	1	6	3	9	2 weeks	\$ 200	Migrate: Start research as soon as possible, get help from Librarians and advisors if needed
Lack of stakeholder involvement	AM		2	3	1	6	2	8	3 weeks	\$ 60	Migrate: create positive environment with open collaboration and active engagement

Critical Success Factors for Project

- Access is given to documents relating to previous festivals
- Meeting defined milestone deadlines



Questions? ερωτήσεις



Alaska Greek Festival Event Management Plan

BY ALLISON MURRELL

Φεστιβάλ Ελληνικού Οδηγού Καλών Πρακτικών

Με Allison Murrell



ALASKA GREEK FESTIVAL EVENT MANAGEMENT PLAN, MURRELL, ALLISON

1

The Alaska Greek Festival

Started in 1995

Surviving on spirit and personality

As it entered its second decade

- Founders are tired
- People are stressed
- Size is unmanageable in current form

GREEK FESTIVAL EVENT MANAGEMENT PLAN, MURRELL, ALLISON

2

What are the issues?

Personality vs process

Dozens of volunteers; 1 leadership position

Maxing out capacity for production and space



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5

Alaska Greek Festival Project

Use PM processes and tools to quantify/ define/ institutionalize the event management of the Alaska Greek Festival

Why?

- Everyone can know how the festival is managed
- Everyone could step up to a different position if they wanted too
- Make money

GREEK FESTIVAL EVENT MANAGEMENT PLAN, MURRELL, ALLISON

4

Who benefits from this project?

This project was created to help the Hellenic people of Alaska

“We are so excited to use this guide to have the best, and least stressful festival in recent memory and finally get this stuff on paper.”

-Angelic

Chairperson

Executing the project

Integration → Charter worked great

Scope → Create Event Management Plan

Timeline → 154 Days, 132 WBS tasks, finished 3 days ahead of schedule

Sept	Oct	Nov	Dec	Jan	Feb	Mar	April
Initiating	Planning	Execution	Monitor/Control	Closeout			

GREEK FESTIVAL EVENT MANAGEMENT PLAN, MURRELL, ALLISON

6

Executing the project

Change → Two changes

- Add the cross comparison research to the research plan
- To change the name of the project

QA/QC → Maintained green status, without unanticipated rework

Risk → low risk project, no major risks occurred, no impact to the project

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

7

First things first, research

Research → Re- search

Literature Research

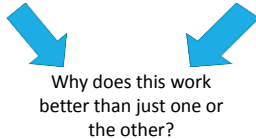
- Festival Management
- Event Management
- Non-Profit Management
- Lean Six Sigma

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

8

Research Analysis

Need a mix of PM tools and event management processes to create an Event Management Plan for the Alaska Greek Festival



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

9

Project Management vs. Event Management

Project Management

Application of processes, methods, knowledge, skills and experience to achieve the project objectives

Event Management

Application of Project Management to the creation and development of large scale events such as festivals



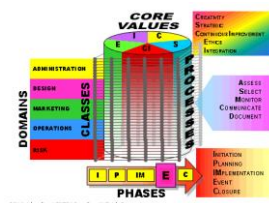
It's a more specialized field

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

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Project Management vs. Event Management

Domain	Initiation	Planning	Execution	Monitoring/Control	Closeout
Project Management	Define project objectives and scope, identify stakeholders, obtain approval to start the project	Develop project management plan, identify risks, develop communication plan, develop resource management plan, develop procurement management plan, develop stakeholder management plan	Direct and manage project work, manage project risks, manage project communications, manage project resources, manage project procurement, manage project stakeholders	Monitor project progress, performance, and risks; identify areas for improvement; report project progress	Finalize all project activities, close out the project, and archive project information
Event Management	Define event objectives and scope, identify stakeholders, obtain approval to start the event	Develop event management plan, identify risks, develop communication plan, develop resource management plan, develop procurement management plan, develop stakeholder management plan	Direct and manage event work, manage event risks, manage event communications, manage event resources, manage event procurement, manage event stakeholders	Monitor event progress, performance, and risks; identify areas for improvement; report event progress	Finalize all event activities, close out the event, and archive event information



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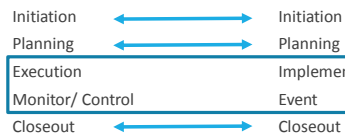
GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

11

Project Management vs. Event Management

Project Management Process Groups

Event Management Phases



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOIN

12

Project Management vs. Event Management

Execution

Complete work as defined in PMP to satisfy project requirements

Implementation

Goods and services are contracted and coordinated

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13

Project Management vs. Event Management

Monitor/ Control

Track and review progress

Event

Operation of event

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOON

14

Project Management vs. Event Management

Project Management Timeline

Sept	Oct	Nov	Dec	Jan	Feb	Mar	April
Initiating	Planning	Execution	Execution	Execution	Execution	Execution	Closeout
		Monitor/ Control					

Event Management Timeline

January	February	March	April	May	June	July	August	Sept
Initiation	Planning	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Closeout

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOON

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Additional Research

Cross-Comparison Spreadsheet

Review of 160 US And Canada Greek Festival websites

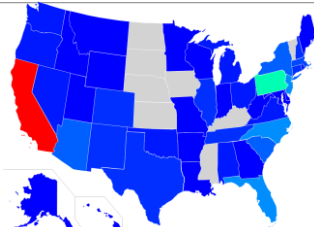
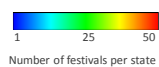
- Snapshot in time of what they did at there festivals
- Assessment of "peer" festivals

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOON

16

Cross-Comparison Spreadsheet Analysis

Heat map



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOON

17

Cross-Comparison Spreadsheet Analysis

Descriptive analysis of the stated mission

- Charity
- Church
- Culture

Food costs

- Average price of Baklava: \$3.00
- Average price of Greek Coffee: \$3.00

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL ALLOON

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Alaska Greek Festival Documents

Primary source documents

Jumble of documents, information, spreadsheets, receipts, and to-do lists

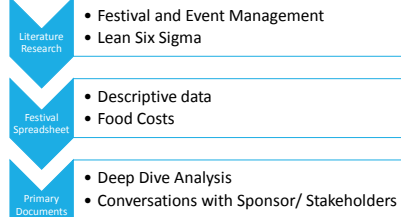
→ Reviewed and completed “Deep Dive”

Complied old recipes with handwritten notes and conversations to create official recipes to create the Costing and Ordering Master Spreadsheet

GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL, ALISON

19

Put that research together



GREEK FESTIVAL BEST PRACTICES GUIDE MURRELL, ALISON

20

Alaska Greek Festival Event Management Plan

5 sections/ 13 sub sections

99 pages

Includes:

- Charter
- Organization Chart
- Change Management Plan
- Costing and Order Master spreadsheet



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL, ALISON

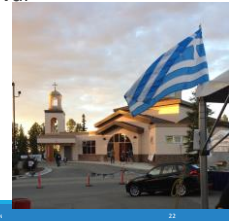
21

Alaska Greek Festival Charter

First official Charter for the festival

Includes

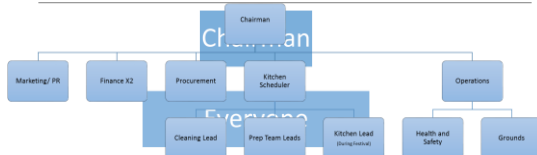
- Key Performance Indicators
- Mission/Goals
- Critical Success Factors
- Organizational Chart



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL, ALISON

22

Alaska Greek Festival Organization Chart



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL, ALISON

23

Change Management Plan and Form

Defines process for controlled change

Capture innovation and creativity

Manage the limited resources



GREEK FESTIVAL EVENT MANAGEMENT PLAN MURRELL, ALISON

24

Costing and Order Master Spreadsheet

Best and most useful part of project

Spreadsheet that calculates out all the ingredients and materials that need to be procured before production

Also calculates per serving cost

~THIS WILL SAVE THEM TIME AND MONEY~

GREEK FESTIVAL EVENT MANAGEMENT PLAN MARRELL ALLOON

25

Project Critical Success Factors

- ☒ Access was given to documents relating to previous Alaska Greek festivals
- ☒ Met milestone deadlines

GREEK FESTIVAL BEST PRACTICES GUIDE MARRELL ALLOON

26

Future Research

Cross- Comparison Spreadsheet

- Define festival metrics to allow for peer-to-peer comparisons

Alaska Greek Festival Economic Impact

- And price index too

GREEK FESTIVAL EVENT MANAGEMENT PLAN MARRELL ALLOON

27

Questions? ερωτήσεις



August 26-28

Have good time! Spend money!

GREEK FESTIVAL EVENT MANAGEMENT PLAN MARRELL ALLOON

28

Lessons Learned Narrative Report

Project:

Alaska Greek Festival Event Management Plan

Why:

The annual Greek Festival in Anchorage Alaska is an event managed by a volunteers, a subcommittee and a chairperson. There are dozens of documents that relate to the operations of the event, and volunteers who know how things have happened in the past, but no clear guidelines or standard practices which leads to inefficiencies, conflicting ideas, confusion and waste.

The deliverable for this project would be the creation of a Greek Festival Event Management Plan. This guide would include a volunteer/human resources management plan, quality assurance methods, as well as metrics gathering systems with tools and techniques that can help the festival subcommittee evaluate resource usage and find efficiencies in their current processes.

Project Development:

Completed PM 686A: Planning and Initiating. Starting research and drafting over the winter break, then start Spring semester with PPM deliverables and the actual guide sections being developed. Also, there is a 40 page thesis paper. No one is calling it a thesis, but that seems to be what it is.

Completed PM 686B: Executing, Controlling and Closing. Close out the project plan, completed the final report, completed final presentation and finished all the work for the final deliverable.

Completed final deliverable: Alaska Greek Festival Event Management Plan.

Lessons Learned:

Below are my lessons learned from the PM 686 Capstone class as it relates to my project.

Knowledge Areas

I had a hard time nailing down what the knowledge areas deliverable was supposed to be. I understood intellectually what was required, but it took several attempts to figure out what was actually required. Initially I had thought it was more like a in depth analysis of how we are using selected knowledge areas on project, kind of like a narrative but more focused on the separate use of the KA. That was incorrect, and luckily, for me, I did not waste too much time on getting to the correct deliverable.

Going forward I have several clear metrics to use to give me meaningful information on how well my project is doing.

For a lesson learned I would encourage others to seek assistance and clarification before the first deliverable is due if there is any hint of doubt as to what the intended deliverable is.

Quality Metrics for the Knowledge Areas

I line with the KA's I struggled with finding good metrics that would be easy to measure and give me solid information on the current status of the project. These metrics are harder than you would think, and I changed them several times, as I came to a submittal date and realized that the data collected did not give me information that I could use to create an analysis of the status of the project.

My lesson learned from this is to reach out earlier to my advisors to help me figure out a better metrics that will help me get good data that is useful.

HR plan

In order respect the time of my advisors, I wrote a very through HR plan and I wish that I had requested more time from them. I worry sometimes that while we are all following the HR plan, that I am missing polishing some areas that other students aren't because their HR policy is more flexible.

Lesson learned: make sure that the HR policy has within it flexibility to shift without having to go through the full change management process. I'm not sure going through the whole process is worth adding in that flexibility, but it may have to be done next semester.

Risk Management

As far a risk management goes, I wish that I had read several more plan from other students doing their capstone projects. I feel that its light, but I also feel that this is a low risk project. Thus, I have mixed feelings. However, it probably better to have a large risk registry where few if any risks occur than a thin one that has most of them occur.

Lesson learned; review the submitted project plans for other students who have completed the program. I reviewed a few, but I should have done a more thorough analysis.

Stakeholder Management

It was as difficult as expected to keep and maintain the stakeholder's involvement in the project. They are all busy people, with lives that don't always match up with mine. Email and text messaging worked, but it was much better to get participation from the stakeholders face-to-face.

Lesson learned: Increase the number of planned face-to-face interactions with stakeholders rather than relying on email or texting.

Final Presentation

I have spent a lot of time worrying about the presentation. I have made several drafts that varied wildly and I'm still not sure if the one that I submitted hits the mark. I wanted to stay far away from the more traditional style of "my name is, this is my project, here's the risk reg..." and make it a more interesting and engaging presentation but I worry that I have gone too far from the expected and may lose points.

Lesson Learned; I think a thorough review of other student's presentations, which are posted on blackboard, would have been helpful before drafting the presentation. Watching them know, I feel better about going forward with my decision, but watching them before drafting my presentation would have saved me all the worry. While worry may not translate into schedule slippage, it would have made the last week or two less stressful.

In addition, having Crissy watch me and a couple of other students really helped. It may be beneficial for future students to have an organized opportunity to practice presenting in front of an audience and get feedback to help where ever they are having issues.

Feedback on Oral Defense

I completely missed impacts and the business case for my project. I also ended 3 minutes early. That's just leaving money on the table.

I was too nervous, and I need to make sure that the next presentation has clear linkage to impacts and the business case. I have to be explicate otherwise I'll repeat the same mistake.

Lesson learned: Impact, Impact, Impact. What is the impact?!?! It's a story of impact, not a narrative of what I did this last year. Those bits have to be woven into the impact.

Application of Knowledge Areas

- Description
- Measure
- Measurement Data Over Time
- Lessons Learned Narrative

Communication Management

1. Description
 - a. Communication will be key on this project. The Greek community is a very tight knit community and to prevent concerns or unmet needs communication will be kept very clear and very regular to ensure that everyone know what's going on at any time
2. Performance measurement method
 - a. Measure response time of emails/ phone call/ texts on project
 - i. Maximum response time of 72 hours
 - ii. Measurement will be taken throughout the project when a communication event happens
3. Measurement Data
 - a. 9/11/15
 - i. 16 points of contract with 12 responses returned within 72 hours
 1. 4 were not responded to at all
 - b. 10/2/15
 - i. 13 points of contract with 9 responses returned within 72 hours
 1. 4 were not responded to at all
 - c. 10/23/15
 - i. 5 points of contract with 2 responses returned within 72 hours
 1. 2 were not responded to at all
 - d. 11/20/15
 - i. 3 points of contact returned within 72 hours
 1. 2 were not responded to at all
 - e. 12/23/15
 - i. 10 points of contact returned within 72 hours
 1. 4 were not responded to at all
 - f. 1/29/16
 - i. 8 points of contact returned within 72 hours
 1. 3 were not responded to at all
 - g. 2/26/16
 - i. 6 points of contact returned within 72 hours
 1. 2 were not responded to at all
 - h. 3/18/16
 - i. 12 points of contact returned within 72 hours
 1. 8 were not responded to at all

- i. 3/28/16
 - i. 8 points of contact returned within 72 hours
 - 1. 2 were not responded to at all
- 4. Lessons Learned Narrative
 - a. Keep stakeholders engaged but not spammed is a tough line follow
 - i. 72 hour rule will allow stakeholders to have expectations that can be met, even if I'm not able to give them what they want
 - b. I don't respond to all emails; typically ones that require no follow-up such as thank you emails, or emails indicating comments have been submitted
 - c. This measure may have to be modified to better reflect the risk that it is attempting to mitigate
 - i. One of the few risks on this project is having stakeholders support turn negative from not feeling like they are properly involved
 - ii. This measure was an attempt to prevent that
 - iii. Will review and decide if change is needed
 - d. This measure is about measuring my response time to questions/ comments/concerns/ etc. and sometime a response is not always needed like if they email me back "thanks" or "see you then". It's not an indicator of me flaking, I just don't want to fill their inbox with one message responses. Texting? No problem, but email is too formal for a one word response.
 - e. Texting is the most informal form of communication, and sometimes get passed over
 - f. Group emails don't always need a reply or a reply all. I had several "reply all" emails that were "thanks" and needed no response.
 - g. I received no response at all to my group email asking for help in the set up section of the guide, and had to go to church to talk to the people directly. That worked out very well, and next time I'll just skip the email and grab people after church.

Stakeholder Management

- 1. Description
 - a. The Greek festival involves dozens of direct stakeholders (parish council, the volunteers, the subcommittee, the chairperson, etc.) and thousands of indirect stakeholders (the anchorage community that attends the festival). Each of them have distinct needs and wants that ought to be addressed. As the main fundraiser for the church it is imperative that the stakeholders are addressed and managed to ensure that the direct stakeholders don't get burned out and that the indirect stakeholders have a good time.
- 2. Performance measurement method
 - ~~a. Measure the inclusion of stakeholders by the rate of contact and the rate of follow up (both PM and Stakeholders rates)~~
 - ~~i. This will show the level of interest in the project~~

- ~~ii. It will also demonstrate the level of commitment that the stakeholders have to this project~~
 - ~~iii. The rate of follow up will establish commitment to the project~~
 - b. Measure the number of opportunities for engagement
 - i. Want a clear understanding of stakeholder interests and concerns
 - ii. Want stakeholders to have buy-in to process
 - iii. Measure email and text response rate
- 3. Measurement Data
 - ~~a. 9/11/15~~
 - ~~i. 16 points of contact/ 12 responses 4 non-responses~~
 - ~~1. Non-responses related to committee members accepting membership in committee and confirming meeting~~
 - ~~b. 10/2/15~~
 - ~~i. 13 points of contact/ 9 responses 4 non-responses~~
 - ~~1. Non-responses related to meeting to sign expectation contract and submittal comments~~
 - ~~c. 10/23/15~~
 - ~~i. 5 points of contact/ 2 responses 2 non-responses~~
 - ~~1. Non-responses related to submitting meeting questions and PPM comments~~
 - ~~d. 11/20/15~~
 - ~~i. 3 points of contact/ 2 responses and 1 non-response~~
 - ~~1. Non-response related to submittal comments~~
 - e. 12/23/15
 - i. Emailed 4 times with responses
 - ii. Texted with responses
 - f. 1/29/16
 - i. Emailed 2 times with responses
 - ii. Facebook messaged meeting request with responses
 - iii. Texted with responses
 - g. 2/26/16
 - i. Emailed 4 times with responses
 - ii. Texted twice with no response; followed up by email to ensure information went through
 - h. 3/18/16
 - i. Emailed 8 times with responses
 - ii. Attended kickoff meeting for Festival
 - i. 3/28/16
 - i. Emailed 6 times with responses
 - ii. Attended church to meet with booth leads and sponsor
- 4. Lessons learned narrative
 - a. I will be sending out more documents and requests then I will be follow up responses. So far, it's a "no news is good news" standard from the advisors. They

are very busy and are likely devoting their limited time resources to people who are in greater need of responses than I.

- b. This measurement will change soon
 - i. It is not giving me the information that I'd like
 - 1. I want a measurement that will give me something more substantive on the level of support of stakeholders
 - 2. LuAnn suggested this on 11/1/15 (being more clear on what stakeholders are reviewing)
 - 3. I'll spend some time this week seeing if the measure can be modified or if it has to be changed
- c. The new measurement is better
 - i. Rather than documenting and counting every interaction, it is more general measure of people responding to requests rather than a count of emails
- d. Getting people nailed down for chats is hard because people are busy. Trying to imagine a way I can send documents out without creating fear or panic –panic that can be eliminated by face-to-face interaction
- e. People can be busy. Trying to get together multiple people at the same time can be difficult.
- f. Stakeholders are not really thinking high level, and seem to be missing the point of the project. Will readdress with project sponsor, and see if what can be done to move people to that higher level of planning (not who's going to Costco, but who's in charge of making sure the Costco trip happens and the right stuff is procured).
- g. Email is a terrible way to communicate to direct, but detached stakeholders. It was much more productive to track them down after church and they were much happier because they could ask questions.

HR Management

- 1. Description
 - a. The Greek festival is run by volunteer. As are the advisors for the project. Proper HR management shows respect to the volunteers and sets clear expectations for both the volunteers and the people managing them. Since the Advisors are volunteers, it is important to take their needs/ wants into account
- 2. Performance measurement method
 - a. Method will be measured in adherence to set Committee Submittal Timeline
 - i. Number of late Submittals/ Total number of Submittals
 - b. Will also be measured in the number of met expectations for the advisors over the number of added expectations that were not made expressly clear at the beginning of the project
 - i. Added Expectations/ Baseline Expectations
 - ii. Change happens, but it is important the expectations of volunteers are clear and precise. Adding additional requirements may have to happen, but

it should be the exception and not the rule. It shows respect and thoughtfulness for the volunteer's time and dignity as a person

3. Measurement Data

- a. 9/11/15
 - i. 0 late submittals/ 1 submittal
- b. 10/2/15
 - i. 0 late submittals/ 2 submittals
- c. 10/23/15
 - i. 0 late submittals/ 4 submittals
- d. 11/20/15
 - i. 0 late submittals/ 6 submittals
- e. 12/23/15
 - i. 0 late submittals/ 4 submittals
- f. 1/29/16
 - i. 0 late submittals/ 3 submittals
- g. 2/26/16
 - i. 0 late submittals/ 3 submittals
- h. 3/18/16
 - i. 0 late submittals/ 2 submittals
 - 1. I did defer report submittal by a week, but I informed the committee in advance of deferment
- i. 3/28/16
 - i. 0 late submittals/ 1 submittal

4. Lessons learned

- a. The capstone requires a lot from the advisors and I feel as if I am overwhelming them
- b. Keeping with the Submittal schedule will help me from feeling like I'm piling work on the Advisors
- c. Submittals every two weeks may be too much review
 - i. Creating more work for committee than needed
- d. Staying on task is key to the next phase of the capstone project
 - i. There is so much work that will need to be done in a short period of time and being fair to the advisors will be important
 - ii. It's not fair to the advisors to be late with a submittal and expect to get any value out of that transaction
- e. Keeping the calendar in the front of my notebook really helps me to see deadlines approaching and keep up to date, and to not miss anything
- f. I need to look ahead to confirm that there are no other "double" submission dates ahead, and if so try and space them out. I have two due on 2/22/16 and it was a bit tough to get everything ready and I'm sure it was a bit overwhelming to the committee advisors.

- g. The report is much longer than anticipated and is in turn taking longer to complete. I also wish I would have got more feedback, but I hope that is because I needed so little help that but others needed more and thus got more.
- h. There would be 2 more submittals after 4/1/16, but since that's the Substantial Completion date for this project, they will be tracked elsewhere.

Quality Management

1. Description

- a. Quality is essential to the project because of the lack of metrics, CSF and QA at the festival itself. I will have to focus on this to so that I can ensure that the guide that is created is of a high, professional quality and include good metrics and QA to stand as a guideline in to how important there can be and hopefully teach the stakeholders a way of implementing these types of things to better their own event and not see it as a negative.

2. Performance measurement method

- ~~a. Methods for measuring quality will be based on the number of hours spent reworking~~

- ~~i. The more hours in a reporting period (class to class) the worse the situation~~

- ~~1. If rework is required, then it must be done. There is no threshold cap because the project must meet the November 30 milestone.~~

- ~~2. Excessive rework (more than 10 hours in a reporting period) will trigger a meeting with committee to discuss root cause~~

- ~~3. The project plan has scheduled editing time that is not rework. Rework will be defined as correcting of defective, failed or non-functional work~~

- b. Method for measuring quality

- i. Use Lean tool to analysis section of festival

- 1. There is one more PPM reporting period before the end of the semester

- 2. I will analysis a minimum of 4 of the 10 separate but distinct section of the Greek festival before the next reporting period

- a. This will help me to better understand the Lean process and how to apply them to the festival.

3. Measurement Data

- a. 9/11/15

- ~~i. No rework to date~~

- b. 10/2/15

- ~~i. No rework to date~~

- c. 10/23/15

- ~~i. No rework to date~~

- d. 11/20/15

- i. I have done 4 value stream mapped of festival areas

1. Working on the second phase of VSM which will required help from stakeholders → Future mapping
 - a. What can we do to fix the bottlenecks, now that they've been identified?
 - ii. VSM Gyro stand, Loukoumades stand, Taverna, and Kafenia stand
 1. Gyro stand has the most problems, partly because it is the busiest and most complex stand
- e. 12/23/15
 - i. I have done 4 more value stream maps of the festival
 1. Not sure if these need future state maps; these are the ones that work well.
 - ii. VSP church tours, dinner stand, agora and cooking demo
- f. 1/29/16
 - i. Certified Green Belt in Lean Six Sigma
- g. 2/26/16
 - i. I have drafted the layouts in Visio for four of the booths
- h. 3/18/16
 - i. I have drafted future state layouts that will hopefully be applied to next year's festival
- i. 3/28/16
 - i. I have updated the layouts and the future state layouts
4. Lessons learned narrative
 - a. ~~While to project has no rework hours currently, this metrics will be important in making sure that I hold myself to the highest standard in creating the project plan and the guide itself~~
 - b. ~~I'm very good at this.~~
 - i. ~~Or I'm delusional and the committee is polite~~
 - c. ~~May want to review measurement data next semester to better capture and protect against risk of low quality work.~~
 - d. Switching measurements will be good. I can practice applying Lean tools to the different sections and use that to help the volunteers to have a better festival next August.
 - e. The next step, fixing the bottlenecks will require direct stakeholder involvement
 - i. Greek culture doesn't take well to being told what to do, so this will require reaching out to the people who run those stands and brainstorm with them to find solutions to those problems. Collaboration is key
 - f. I think I'll limit the future mapping to the Gyro stand
 - i. It's going to be very complicated and controversial and I's rather focus my energy on one that is in a problem state.
 - g. Green Six Sigma class was awesome
 - i. I learned so much and I think everyone should take the class
 - ii. It will help me to better apply tools to help build efficiency into the festival

- h. Visio is not as intuitive as I thought and it took a bit longer than expected to get it to make something that would work. YouTube was very helpful in getting me passed some sticking points
- i. Stakeholders are 50/50 on if they will take the advice on future mapping. I'm hoping I can convince them, but ultimately they get to decide for themselves.
- j. I ended up not including the layouts in the final deliverable because I felt it didn't match the rest of the document. The Event plan was a high level planning documents, and these stuck out as a "weeds" level item. I removed it to keep maintain the purpose of the document. I felt that if it was included, people every year would flip to just that section and skip everything else. They will still be in the final digital file, just not in the complied guide.

PROJECT MANAGEMENT PLAN
GREEK FESTIVAL ~~BEST PRACTICES GUIDE~~ EVENT MANAGEMENT PLAN
ALLISON MURRELL

2/17/201612/1/2015

Summary of Changes

Date	Change Detail	Signature
11/20/15	Changed Charter to Intro, edits and continuity errors corrected, Updated appendix	AM
12/1/15	Updated schedule	AM
<u>2/17/16</u>	<u>Changed project name</u>	<u>AM</u>

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PROJECT INTRODUCTION

Problem Objective

Every year, in late August, the Holy Transfiguration Greek Orthodox Church hosts the annual Alaska Greek Festival. The Parish Council, along with a chair person, organize, plan and execute the large multi-day event to raise funds for the building of the new church, to invite the community to experience some Greek culture.

There is a need to take the institutional knowledge from the Parish Council and the Chairperson, clarify that knowledge and place it in written documents to allow for the codification and assessment of previous festivals.

A ~~Best Practices Guide~~Event Management Plan should be created to facilitate the hosting of the annual event, to clarify the process of hosting the event, and to build a mechanism within the ~~Best Practices Guide~~Event Management Plan to create efficiencies and quality assurance metrics.

Project Outcomes

A ~~Best Practices guide~~Event Management Plan will be created for the Holy Transfiguration Greek Orthodox Church to help solidify the institutional knowledge of the planning and execution of the annual Alaska Greek Festival in order to clarify and organize the planning, execution and closing of the event.

Project Goals and Objectives

Project Goals include:

Clearly defining the processes involved in hosting the Alaska Greek Festival to enhance the experience of the festival for the volunteers, parish members and the community.

Project Objectives include:

Create a “Greek Festival ~~Best Practices Guide~~Event Management Plan” for use by the Holy Transfiguration Greek Orthodox Church in planning and executing their annual Greek Festival

Document the institutional knowledge of how to host event

Define clear set of operational standards for event

Define all processes involved in the planning, execution and close out for event

Define timeline of planning process for events

High Level Requirements

The objectives which mutually support the milestones and deliverables for this project have been identified. In order to be successful on this project we must:

- Be allowed access to previous festival documents and volunteers
- Stakeholders maintain positive support of project

Additional requirements may be added as necessary, with project sponsor approval, as the project moves forward.

Deliverables

The following deliverables must be met upon the successful completion of the Greek Festival ~~Best Practice Guide~~Event Management Plan Project:

- A ~~Best Practices Guide~~Event Management Plan tailored to the needs of the Greek Festival in and electronic format

Funding Authority

The funding authority for this project is Allison Murrell. As this is a research based project, there will be no funding made available.

Cost will be used to help track the Cost Performance Index (CPI) Key Performance Indicator (KPI). Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

All documents, including the final ~~Best Practice Guide~~Event Management Plan, will be sent electronically to prevent cost from being incurred.

Project Oversight Authority

The project advisory committee will be formed to oversee the project planning, execution and review of final deliverables.

They will have oversight and offer guidance on the project from accepting their role on the committee until the project is completed.

Acceptance Criteria

Acceptance criteria have been established for the Greek Festival Best Practices Project to ensure thorough vetting and successful completion of the project. The acceptance criteria are both qualitative and quantitative in nature. All acceptance criteria must be met in order to achieve success for this project:

1. Meet all deliverables within scheduled time and budget tolerances
2. Work with key stakeholders to create deliverable
3. Be completed before April 1st, 2016
4. Final document given to the Holy Transfiguration Greek Orthodox Church for their use in hosting the annual Greek Festival

SCOPE MANAGEMENT PLAN

Project Scope

This Project Scope Statement serves as a baseline document for defining the scope of the Greek Festival Best Practices Project, project deliverables, work which is needed to accomplish the deliverables, and ensuring a common understanding of the project's scope among all stakeholders. All project work should occur within the framework of the project scope statement and directly support the project deliverables. Any changes to the scope statement must be vetted through the approved Project Change Management Process prior to implementation. This completion date for this project is April 1st, 2016.

The Greek Festival Best Practices Project must include the following:

- Research of Alaska Greek Festival
- Research of Other Greek Festivals in the US
- Create a ~~Best Practices Guide~~Event Management Plan that will include the following:
 - Initiation approval process
 - Planning procedures
 - Schedule management plan including a timeline for planning
 - Financial management plan for festival funds
 - Procurement management process
 - Stakeholder management plan
 - Communication plan for both volunteers, stakeholders and community
 - HR/ Volunteer management plan
 - Risk management process
 - Quality management process
 - Change management process
 - Set up procedures, including layouts, installation and management best practices
 - Clean up procedures
 - Close out procedures

Copy of final ~~Best Practice guide~~Event Management Plan will be given to Festival Subcommittee and Festival Chairperson

Project Excludes:

- Researching other types of cultural festivals and fairs
- Managing the execution of the Greek Festival
- ~~Best practice guide~~Event Management Plan- does not have to be accepted or implemented by Festival Subcommittee or Chairperson

Critical Success Factors

The critical success factors will be:

- Meeting defined milestone deadlines
- Access is given to documents relating to previous festivals

Key Performance Indicators

Key Performance Indicators for this project include:

- % of milestones missed
 - o With a threshold not to exceed 34% of total milestones
- % of Overdue Project tasks
 - o With a threshold not to exceed 34% of total project tasks
- Schedule Performance Index (SPI)
 - o With a threshold not to fall below .95 and not to go above 1.1
- Cost Performance Index (CPI)
 - o With a threshold not to fall below .95 and not to go above 1.1

Constraints

Several constraints have been identified for the Greek Festival Best Practices Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified for the project:

1. Deliverable must be complete by April 1st, 2016
2. Project Scope can expand to include additional sections of the ~~Best Practices guide~~Event Management Plan to address the needs of stakeholders
3. Budget can be increased if approved by Project Manger

Assumptions

Several assumptions have been identified for the Greek Festival Best Practices Project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

1. Key stakeholder support and involvement in research portion of project
2. Low risk project → very limited risk management due to nature of research project

Project Risks

Risks that could affect the project are as follows;

Internal:

- Access to documents from previous festivals
- Cooperation of current and past volunteers

External:

- Ability to find information from other Greek Festivals

Greater detail and analysis will be documented in the Risk Registry and the Risk Management plan.

The Letter of Support detailing the support of the organization and a draft of the final is Greek Festival ~~Best Practice Guide~~ Event Management Plan Table of Contents located at Appendix B and C.

SCHEDULE MANAGEMENT PLAN

The project schedule is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the project team, sponsor, and stakeholders a picture of the project's status at any given time. The purpose of the schedule management plan is to define the approach the project team will use in creating the project schedule. This plan also includes how the team will monitor the project schedule and manage changes after the baseline schedule has been approved. This includes identifying, analyzing, documenting, prioritizing, approving or rejecting, and publishing all schedule-related changes.

Schedule Management Approach

Project schedules will be created using MS Project 2013 starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved, the project manager will approve and baseline the schedule.

The following will be designates as milestones for the project schedule:

Milestone/Deliverable	Target Date
Letter of support submitted	9/16/15
Initial research methods approved	10/2/15
PM Plan Draft submitted for review	11/6/15
PM Plan Approved/ Research Process Approved	11/20/15
Research Complete	1/7/16
Finalized Guide -Sections I-XIII	4/1/16
Final Presentation Presented	4/1/16

Milestone/Deliverable	Target Date
Final Best Practices Guide <u>Event Management Plan</u> Completed	4/1/16

Schedule Control

The project schedule will be reviewed and updated as necessary on a bi-weekly basis with actual start, actual finish, and completion percentages which will be provided by task owners.

The project manager is responsible for holding bi-weekly schedule updates/reviews; determining impacts of schedule variances; submitting schedule change requests; and reporting schedule status in accordance with the project's communications plan.

The project team is responsible for participating in bi-weekly schedule updates/reviews; communicating any changes to actual start/finish dates to the project manager; and participating in schedule variance resolution activities as needed.

Variance thresholds will be set at:
CPI less than 0.95 or greater than 1.1
SPI less than 0.95 or greater than 1.1

If the change is approved then it will be implemented by the Project Manager, who will update the schedule and all documentation and communicate the change to all stakeholders in accordance with the Change Control Process.

The Project Schedule Baseline and Work Breakdown Structure are provided in Appendix D.

CHANGE MANAGEMENT PLAN

The Change Management Plan was created for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project in order to set expectations on how the approach to changes will be managed, what defines a change, the purpose and role of the change control board, and the overall change management process. All stakeholders will be expected to submit or request changes to the project in accordance with this Change Management Plan and all requests and submissions will follow the process detailed herein.

Change Management Approach

The Change Management approach for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will ensure that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of this project are approved and implemented.

The Change Management approach is not to be confused with the Change Management Process which will be detailed later in this plan. The Change Management approach consists of three areas:

- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

The Change Management process has been designed to ensure this approach is followed for all changes. By using this approach methodology, the Greek Festival ~~Best Practices Guide~~Event Management Plan Project Manager will prevent unnecessary change from occurring and focus its resources only on beneficial changes within the project scope.

Definitions of Change

There are several types of changes which may be requested and considered for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project. Depending on the extent and type of proposed changes, changes to the project documentation and the communication of these changes will be required to include any approved changes into the project plan and ensure all stakeholders are notified. Types of changes include:

- Scheduling Changes: changes which will impact the approved project schedule. These changes may require fast tracking, crashing, or re-baselining the schedule depending on the significance of the impact.
- Budget Changes: changes which will impact the approved project budget. These changes may require requesting additional funding, releasing funding which would no longer be required, or adding to project or management reserves. May require changes to the cost baseline.
- Scope Changes: changes which are necessary and impact the project's scope which may be the result of unforeseen requirements which were not initially planned for. These changes may also impact budget and schedule. These changes may require revision to WBS, project scope statement, and other project documentation as necessary.

The project manager must ensure that any approved changes are communicated to the project stakeholders. Additionally, as changes are approved, the project manager must ensure that the changes are captured in the project documentation where necessary. These document updates must then be communicated to the project team and stakeholders as well.

Roles and Responsibilities

The following are the roles and responsibilities for all change management efforts related to the Greek Festival ~~Best Practices Guide~~Event Management Plan Project:

Project Manager:

- Approve all changes to budget/funding allocations
- Approve all changes to schedule baseline
- Approve any changes in project scope

- Receive and log all change requests from project stakeholders
- Conduct preliminary risk, cost, schedule, scope analysis of change
- Seek clarification from change requestors on any open issues or concerns
- Make documentation revisions/edits as necessary for all approved changes

Change Control Process

The Change Control Process for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will follow the organizational standard change process for all projects. The project manager has overall responsibility for executing the change management process for each change request.

- 1) Identify the need for a change – Change requestor will submit a completed change request form to the project manager.
- 2) Project Manager will log change in the change request register– The project manager will keep a log of all submitted change requests throughout the project’s lifecycle.
- 3) Evaluate the change– The project manager will analyze the impact of the change to risk, cost, schedule, and scope and seek clarification from team members and the change requestor.
- 4) Decision on change request– The project manager will decide whether or not it will be approved based on all submitted information.
- 5) Implement change– If a change is approved the project manager will update and re-baseline project documentation as necessary.

Change Form and Change Log are located in Appendix F.

COMMUNICATIONS MANAGEMENT PLAN

The purpose of the Communications Management Plan is to define the communication requirements for the project and how information will be distributed. The Communications Management Plan defines the following:

- What information will be communicated—to include the level of detail and format
- How the information will be communicated—in meetings, email, telephone, web portal, etc.
- When information will be distributed—the frequency of project communications both formal and informal
- Who is responsible for communicating project information
- Communication requirements for all project stakeholders
- What resources the project allocates for communication
- How changes in communication or the communication process are managed
- The flow of project communications
- Any constraints, internal or external, which affect project communications
- Any standard templates, formats, or documents the project must use for communicating
- An escalation process for resolving any communication-based conflicts or issues

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a communications matrix which maps the communication requirements of this project. An in-depth guide for conducting meetings details both the communications rules and how the meetings will be conducted, ensuring successful meetings. A project team directory is included to provide contact information for all stakeholders directly involved in the project.

Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix presented in this document. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it and to whom to communicate.

As with most project plans, updates or changes may be required as the project progresses or changes are approved. Changes or updates may be required due to changes in personnel, scope, budget, or other reasons. Additionally, updates may be required as the project matures and additional requirements are needed. The project manager is responsible for managing all proposed and approved changes to the communications management plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with the project's Change Management Plan and ensures that all project stakeholders remain aware and informed of any changes to communications management.

COST MANAGEMENT PLAN

The Project Manager will be responsible for managing and reporting on the project's cost throughout the duration of the project. During the monthly project status meeting, the Project Manager will meet to present and review the project's cost performance for the preceding month. Performance will be measured using earned value. The Project Manager is responsible for accounting for cost deviations.

There are no costs for this project. Cost will be used to help track metrics on the Key Performance Index (KPI). Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

Cost Management Approach

Costs for this project will be managed at the fourth level of the Work Breakdown Structure (WBS). Control Accounts (CA) will be created at this level to track costs. Earned Value calculations for the CA's will measure and manage the financial performance of the project. Although activity cost estimates are detailed in the work packages, the level of accuracy for cost management is at the fourth level of the WBS.

Cost variances of +/- 0.1 in the cost and schedule performance indexes will change the status of the cost to cautionary; as such, those values will be changed to yellow in the project status reports.

Cost variances of +/- 0.2 in the cost and schedule performance indexes will change the status of the cost to an alert stage; as such, those values will be changed to red in the project status reports. This will require corrective action from the Project Manager in order to bring the cost and/or schedule performance indexes below the alert level.

Corrective actions will require a project change request and be must approved by the Project Sponsor before it can become within the scope of the project.

Measuring Project Costs

Performance of the project will be measured using Earned Value Management. The following four Earned Value metrics will be used to measure to projects cost performance:

- Schedule Variance (SV)
- Cost Variance (CV)
- Schedule Performance Index (SPI)
- Cost Performance Index (CPI)

If the Schedule Performance Index or Cost Performance Index has a variance of between 0.1 and 0.2 the Project Manager must report the reason for the exception. If the SPI or CPI has a variance of greater than 0.2 the Project Manager must report the reason for the exception and provide management a detailed corrective plan to bring the projects performance back to acceptable levels.

Performance Measure	Yellow	Red
Schedule Performance Index (SPI)	Between 0.95 and Between 1.1 and 1.2	Less Than 0.95 or Greater than 1.2
Cost Performance Index (CPI)	Between 0.95 and Between 1.1 and 1.2	Less Than 0.95 or Greater than 1.2

Reporting Format

Reporting for cost management will be included in the monthly project status report. This section will contain the Earned Value Metrics identified in the previous section. All cost variances outside of the thresholds identified in this Cost Management Plan will be reported on including any corrective actions which are planned. Change Requests which are triggered based upon project cost overruns will be identified and tracked in this report.

Cost Variance Response Process

The Control Thresholds for this project is a CPI or SPI of less than 0.8 or greater than 1.2. If the project reaches one of these Control Thresholds, a Cost Variance Corrective Action Plan is required. The Project Manager will present options for corrective actions within five business days from when the cost variance is first reported. Within three business days from when the Project Manager selects a corrective action option, and will create a formal Cost Variance Corrective Action Plan. The Cost Variance Corrective Action Plan will detail the actions necessary to bring the project back within budget and the means by which the effectiveness of the actions in the plan will be measured.

Cost Change Control Process

The cost change control process will follow the established project change request process. Approvals for project budget/cost changes must be approved by the project sponsor.

PROCUREMENT MANAGEMENT PLAN

This Procurement Management Plan sets the procurement framework for this project. This will serve as a guide for managing procurement throughout the life of the project and will be updated as acquisition needs change.

Procurement Management Approach

The Project Manager will provide oversight and management for all procurement activities under this project. The Project Manager will work with the project team to identify all items to be procured for the successful completion of the project.

Procurement Definition

The following procurement items and/or services have been determined to be essential for project completion and success. The following list of items/services, justification, and timeline:

There are no purchases for this project

The following individuals are authorized to approve purchases for the project, should the need arise:

<u>Name</u>	<u>Role</u>
Allison Murrell	Project Manager

Decision Criteria

While this project requires no procurement, in the event procurement is required, the Project Manager will work with the project team to identify all items or services to be procured for the successful completion of the project

In the event a procurement becomes necessary, the Project Manager will be responsible for management any selected vendor or external resource. The Project Manager will also measure performance as it relates to the vendor providing necessary goods and/or services and communicate this to the purchasing and contracts groups.

STAKEHOLDER MANAGEMENT PLAN

The Stakeholder Management Strategy for the Greek Festival ~~Best Practices Guide~~Event Management Plan Project will be used to identify and classify project stakeholders; determine stakeholder power, interest, and influence; and analyze the management approach and communication methodology for project stakeholders. This will allow us to identify key influential stakeholders to solicit input for project planning and gain support as the project progresses. This will benefit the project by minimizing the likelihood of encountering competing objectives and maximizing the resources required to complete the project.

Early identification and communication with stakeholders is imperative to ensure the success of the Greek Festival ~~Best Practices Guide~~Event Management Plan Project by gaining support and input for the project. Some stakeholders may have interests which may be positively or negatively affected by the Greek Festival ~~Best Practices Guide~~Event Management Plan Project. By initiating early and frequent communication and stakeholder management, we can more effectively manage and balance these interests while accomplishing all project tasks.

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project's Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project's communication channels and ensure that stakeholders have access to these channels. If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project's Stakeholder Register and use this, along with the project communication matrix as the basis for all communications. The Project Manager will take the lead role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix below. The Communications Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Monthly Status Report	Email summary of project status	Monthly	Email	Project Manager, Team	Status Report	Project Manager
Bi-weekly Project Meeting	Meeting to review action register and status	Bi-Weekly	In Person/ Email	Project Manager, Project Team	Updated Action Register	Project Manager
Project Monthly Review (PMR)	Present metrics and status to team and sponsor	Monthly	In Person	Project Manager, Team, and Class	Status and Metric Presentation	Project Manager
Project Gate Reviews	Present closeout of project phases and kickoff next phase	As Needed	In Person	Project Manager, Team	Phase completion report and phase kickoff	Project Manager

Project team directory for all communications is:

Name	Title	E mail	Office Phone	Cell Phone
Project Manager	Allison Murrell	ammurrell@uaa.alaska.edu	317-3198	
Primary Advisor	LuAnn Piccard	lpiccard2@uaa.alaska.edu	786-1924	
Committee Advisor	Roger Hull	rkhull@uaa.alaska.edu	786-1924	
Committee Advisor	Seong Dae Kim	sdkim2@uaa.alaska.edu	786-1924	

Communications Conduct

Meetings

During all project meetings, the timekeeper will ensure that the group adheres to the times stated in the agenda and the recorder will take all notes for distribution to the team upon completion of the meeting. It is imperative that all participants arrive to each meeting on time and all cell phones and blackberries should be turned off or set to vibrate mode to minimize distractions.

Email

All email pertaining to the Project should be professional, free of errors, and provide brief communication. Email should be distributed to the correct project participants in accordance with the communication matrix above based on its content. All attachments should be submitted through the collaboration area on Blackboard. If the email is to bring an issue forward then it should discuss what the issue is, provide a brief background on the issue, and provide a recommendation to correct the issue.

Informal Communications

While informal communication is a part of every project and is necessary for successful project completion, any issues, concerns, or updates that arise from informal discussion between team members must be communicated to the Project Manager so the appropriate action may be taken.

Identifying Stakeholders

The following criteria will be used to determine if an individual will be included as a stakeholder:

- 1) Will the person or their organization be directly or indirectly affected by this project?
- 2) Does the person or their organization hold a position from which they can influence the project?
- 3) Does the person have an impact on the project's resources (material, personnel, funding)?
- 4) Does the person or their organization have any special skills or capabilities the project will require?
- 5) Does the person potentially benefit from the project or are they in a position to resist this change?

Any individual who meets one or more of the above criteria will be identified as a stakeholder. Stakeholders from the same organization will be grouped in order to simplify communication and stakeholder management.

Key Stakeholders

As a follow on to Identify Stakeholders, the project team will identify key stakeholders who have the most influence on the project or who may be affected the most by it. These key stakeholders are those who also require the most communication and management which will be determined as stakeholders are analyzed. Once identified, the Project Manager will develop a plan to obtain their feedback on the level of participation they desire, frequency and type of communication, and any concerns or conflicting interests they have.

Based on the feedback gathered by the project manager, the determination may be made to involve key stakeholders on steering committees, focus groups, gate reviews, or other project meetings or milestones. Thorough communication with key stakeholders is necessary to ensure all concerns are identified and addressed and that resources for the project remain available.

Stakeholder Analysis

Once all Greek Festival ~~Best Practices Guide~~Event Management Plan Project stakeholders have been identified, the project team will categorize and analyze each stakeholder. The purpose of this analysis is to determine the stakeholders' level of power or influence, plan the management approach for each stakeholder, and to determine the appropriate levels of communication and participation each stakeholder will have on the project.

Once all stakeholders have been identified, the project team will utilize a power/interest matrix to illustrate the potential impact each stakeholder may have on the project. Based on this analysis the project team will also complete a stakeholder analysis matrix which illustrates the concerns, level of involvement, and management strategy for each stakeholder.

The chart below will be used to establish key stakeholders and their levels of power and interest for use on the power/interest chart as part of the stakeholder analysis located in the Stakeholder Registry worksheet.

Key	Organization	Name	Interests (1-5)	Power (1-5)
1	Allison Murrell	PM	4	4
2	Angelic Pournatzis	Chairperson	4	4
3	Bill Copadis	President Parish Council	2	2
4	Father Vasili	Priest	3	2
5	Committee	Advisers	4	4
6	Parish	Church members/ Greeks	1	2

Detailed Stakeholder Registry and Analysis is located at Appendix G.

QUALITY MANAGEMENT PLAN

The Quality Management Plan for the Greek Festival ~~Best Practices Guide~~Event Management Plan project will establish the activities, processes, and procedures for ensuring a quality product upon the conclusion of the project. The purpose of this plan is to:

- Ensure quality is planned
- Define how quality will be managed
- Define quality assurance activities
- Define quality control activities
- Define acceptable quality standards

Quality Management Approach

The quality management approach for the Greek Festival ~~Best Practices Guide~~Event Management Plan project will ensure quality is planned for both the product and processes. In order to be successful, this project will meet its quality objectives by utilizing an integrated quality approach to define quality standards, measure quality and continuously improve quality.

Process quality for the project will focus on the processes by which the project deliverable will be manufactured. Establishing process quality standards will ensure that all activities conform to an organizational standard which results in the successful delivery of the product.

Metrics will be established and used to measure quality throughout the project life cycle for the product and processes. The Project Manager will be responsible for working with the project team to define these metrics, conduct measurements, and analyze results. These product and process measurements will be used as one criterion in determining the success of the project and must be reviewed by the project sponsor. Metrics will include:

Methods for measuring project progress

- % of milestones missed
 - o With a threshold not to exceed 34% of total milestones
- % of Overdue Project tasks
 - o With a threshold not to exceed 34% of total project tasks
- Schedule Performance Index (SPI)
 - o $SPI = \text{Earned Value} / \text{Planned Value}$
 - o SPI will be calculated monthly and issued with status reports and be presented at PM 686A classes
 - o With a threshold not to fall below .95 or exceed 1.1
- Cost Performance Index (CPI)
 - o $CPI = \text{Earned Value} / \text{Actual Cost}$
 - o CPI will be calculated monthly and issued with status reports and be presented at PM 686A classes
 - o With a threshold not to fall below .95 or exceed 1.1

If thresholds are breached, work will stop on project until an action plan can be created and implemented to address the issue. The change process will be used to assess any changes to the project scope, cost or schedule.

Quality Requirements / Standards

Process Quality

The process quality standards and requirements will be determined by the Project Manager. The Greek Festival ~~Best Practices Guide~~Event Management Plan project team will work to establish acceptable standards and document these standards for incorporation into the Greek Festival ~~Best Practices Guide~~Event Management Plan project plan. These standards will be communicated to all project stakeholders.

Quality will be assessed by committee. Documents will be submitted to committee and committee will assess and give comment to Project manager on the, who will then update the documents to create better a quality product.

Quality Assurance

The quality assurance of the Greek Festival ~~Best Practices Guide~~Event Management Plan project focuses on the processes used in the manufacturing of the ~~best practices guide~~Event Management Plan. In order to ensure quality, an iterative quality process will be used throughout the project life cycle. This iterative process includes measuring process metrics, analyzing process data, and continuously improving the processes.

The Project Manager will perform assessments at planned intervals throughout the project to ensure all processes are being correctly implemented and executed.

Process improvement is another aspect of quality assurance. Quality assurance reviews, findings, and assessments should always result in some form of process improvement. All process improvement efforts must be documented, implemented, and communicated to all stakeholders as changes are made.

Quality Control

The quality control of the Greek Festival ~~Best Practices Guide~~Event Management Plan project focuses primarily on the product and the acceptable standards and performance.

The Project Manager will schedule regularly occurring project, management, and document reviews. In these reviews, the project team members are encouraged to provide feedback to the Project Manager to improve the quality of the product being produced. By doing so, the project team will ensure that the product achieves a high level of professionalism and thoroughness.

Approved research plan and application of knowledge areas are located in Appendix H.

RISK MANAGEMENT PLAN

The purpose of the risk management plan is to establish the framework in which the project team will identify risks and develop strategies to mitigate or avoid those risks. However, before risks can be identified and managed, there are preliminary project elements which must be completed. These elements are outlined in the risk management approach.

This project is considered a low risk project as it is a research project.

Top Three Risks

The top three high probability and high impact risks to this project are:

- Lack of access to research documents
- Lack of online resources for research
- Lose positive support of Stakeholders

Risk Management Approach

The approach we have taken to manage risks for this project included a methodical process by which the project team identified, scored, and ranked the various risks. The most likely and highest impact risks were added to the project schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule. Risk managers will provide status updates on their assigned risks in the bi-weekly project team meetings, but only when the meetings include their risk's planned timeframe. Upon the completion of the project, during the closing process, the project manager will analyze each risk as well as the risk management process. Based on this analysis, the project manager will identify any improvements that can be made to the risk management process for future projects. These improvements will be captured as part of the lessons learned knowledge base.

Risk Identification

For this project, risk identification was conducted by the Project Manager during the indication phase of the project. Risks were defined as low, due to the research nature of the project. Risks will still be defined, assessed and managed.

Risk Qualification and Prioritization

In order to determine the severity of the risks identified by the team, a probability and impact factor was assigned to each risk. This process allowed the project manager to prioritize risks based upon the effect they may have on the project. The project manager utilized a probability-impact matrix to facilitate the team in moving each risk to the appropriate place on the chart.

Once the risks were assigned a probability and impact and placed in the appropriate position on the chart, the recorder captured the finished product and the project manager moved the process on to the next step: risk mitigation/avoidance planning.

Risk Monitoring

The most likely and greatest impact risks have been added to the project plan to ensure that they are monitored during the time the project is exposed to each risk. At the appropriate time in the project schedule a Risk Manager is assigned to each risk. Risk monitoring will be a continuous process throughout the life of this project. As risks approach on the project schedule the project manager will ensure that the appropriate risk manager provides the necessary status updates which include the risk status, identification of trigger conditions, and the documentation of the results of the risk response.

Risk Mitigation and Avoidance

The project manager has led the project team in developing responses to each identified risk. As more risks are identified, they will be qualified and the team will develop avoidance and mitigation strategies. These risks will also be added to the Risk Register and the project plan to ensure they are monitored at the appropriate times and are responded to accordingly.

The risks for this project will be managed and controlled within the constraints of time, scope, and cost. All identified risks will be evaluated in order to determine how they affect this triple constraint. The project manager, with the assistance of the project team, will determine the best way to respond to each risk to ensure compliance with these constraints.

In extreme cases it may be necessary to allow flexibility to one of the project's constraints. Only one of the constraints for this project allows for flexibility as a last resort. If necessary, funding may be added to the project to allow for more resources in order to meet the time (schedule) and scope constraints. Time and scope are firm constraints and allow for no flexibility. Again, the cost constraint is flexible only in extreme cases where no other risk avoidance or mitigation strategy will work.

Risk Register

The Risk Register for this project is a log of all identified risks, their probability and impact to the project, the category they belong to, mitigation strategy, and when the risk will occur. The register was created through the initial project risk management meeting led by the project manager. During this meeting, the project team identified and categorized each risk. Additionally, the team assigned each risk a score based on the probability of it occurring and the impact it could potentially have. The Risk Register also contains the mitigation strategy for each risk as well as when the risk is likely to occur.

Based on the identified risks and timeframes in the risk register, each risk has been added to the project plan. At the appropriate time in the plan—prior to when the risk is most likely to occur—the project manager will assign a risk manager to ensure adherence to the agreed upon mitigation strategy. The each risk manager will provide the status of their assigned risk at the bi-weekly project team meeting for their risk’s planned timeframe.

The Risk Register and Lessons Learned for this project are located at Appendix I.

HUMAN RESOURCES MANAGEMENT PLAN

Human resources management is an important part of the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project. The human resources management plan is a tool which will aid in the management of this project’s human resource activities throughout the project until closure. The human resources management plan includes:

- Roles and responsibilities of team members throughout the project
- Project organization charts

The purpose of the human resources management plan is to achieve project success by ensuring the appropriate human resources are acquired with the necessary skills, resources are trained if any gaps in skills are identified, team building strategies are clearly defines, and team activities are effectively managed.

Roles and Responsibilities

The roles and responsibilities for the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project are essential to project success. All team members must clearly understand their roles and responsibilities in order to successfully perform their portion of the project. For the Greek Festival ~~Best Practices~~ GuideEvent Management Plan Project the following project team roles and responsibilities have been established:

Project Manager (PM), (1 position): Be the primary resource for this project. Will create and manage all documentation need to complete this project. Will submit documents according to the Committee Submittal Review Schedule and meet all other dates and deadline required to complete the project. Will fulfill role as “Student” in the Expectations for PM 686A/B Capstone Project advising. Will be responsible for executing PM Project plan and any other tasks as needed to complete the project and the capstone classes.

Primary Advisor (1 positions): Be the primary adviser for the Project Manager to help create a strong PM plan and a comprehensive deliverable for the project. Will coordinate input for other committee members for PPM deliverables and final project deliverables. Will analyze and assess administrative go/no go phase gates. Will assign final grade for project. Will provide feedback on submitted documents in a timely fashion, as laid out in the calendar.

Committee Members (2 positions): Will provide feedback on submitted documents in a timely fashion, as laid out in the calendar. Will attend final presentation, for both 686A and 686B. Will add value to the overall project through their input and knowledge.

RACI Charts

The RACI (Responsible/ Accountable/ Consulted/ Informed) chart shows the relationship between project tasks and team members. Any proposed changes to project responsibilities must be reviewed and approved by the project manager. Changes will be proposed in accordance with the project's change control process. As changes are made all project documents will be updated and redistributed accordingly.

The Project Committee Submission Review schedule shows the relationship between project tasks and the submittal schedule. Any proposed changes to this must be reviewed and approved by the project manager. Changes will be proposed in accordance with the project's change control process. As changes are made all project documents will be updated and redistributed accordingly.

Staff Acquisition

For the Greek Festival ~~Best Practices Guide~~Event Management Plan Project the project staff will consist entirely of internal department resources. There will be no outsourcing/contracting performed within the scope of this project.

Advisors will be asked to participate. 30 days' notice will be given by advisers who would like to be removed from this project so the Project Manager has time to find a replacement.

Resource Calendar

The Greek Festival ~~Best Practices Guide~~Event Management Plan Project will last for two semesters. All resources are required before the project can begin.

A calendar will be issued that will include deadlines for the Project Manager and the committee for work packages to be completed.

The calendar will include submittal deadlines, committee review comments deadline, PPM deadlines, and important dates and deadlines for UAA/ PM Department. The calendar can be updated as needed without going through the formal change management process.

Resource Calendar, Committee Submittal spreadsheet, Signed Committee Expectations Contract and the RACI Chart can be found at Appendix J.

APPENDIX

- A- Project Charter
- B- Letter of Support
- C- Greek Festival ~~Best Practices Guide~~Event Management Plan Table of Contents and Final report outline
- D- Project Schedule/ Work Breakdown Structure
- E- Communication Matrix
- F- Change Form and Change Log
- G- Stakeholder Registry and Analysis
- H- Approved Research Plan/ Knowledge Areas
- I- Risk Registry/ Lessons Learned Narrative
- J- Resource Calendar/ Committee Expectations /Committee Submission Schedule/ Requirement Tractability Matrix
- K- Status reports

PROJECT CHARTER

Greek Festival Best Practices Guide

VERSION: 2

REVISION DATE: 11/20/2015

Approval of the Project Charter indicates an understanding of the purpose and content described in this document. By signing this document, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Allison Murrell	PM		11/20/15

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Section 1. Project Overview

1.1 Problem Objective

Every year, in late August, the Holy Transfiguration Greek Orthodox Church hosts the annual Alaska Greek Festival. The Parish Council, along with a chair person, organize, plan and execute the large multi-day event to raise funds for the building of the new church, to invite the community to experience some Greek culture.

There is a need to take the institutional knowledge from the Parish Council and the Chairperson, clarify that knowledge and place it in a written documents to allow for the codification and assessment of pervious festivals.

A best practices guide should be created to facilitate the hosting of the annual event, to clarify the process of hosting the event and to build a mechanism within the best practices guide to create efficiencies and quality assurance metrics.

1.2 Project Outcomes

A Best Practices guide will be created for the Holy Transfiguration Greek Orthodox Church to help solidify the institutional knowledge of the planning and execution of the annual Alaska Greek Festival in order to clarify and organize the planning, execution and closing of the event.

1.3 Project Goals and Objectives

Project Goals include:

- Clearly defining how to host the Alaska Greek Festival to enhance the experience of the festival for the volunteers, parish members and the community.

Project Objectives include:

- Create a "Greek Festival Best Practices Guide" for use by the Holy Transfiguration Greek Orthodox Church in planning and executing their annual Greek Festival

- Document the institutional knowledge of how to host event

- Instill a clear set of operational standards for event

- Clearly define all processes involved in the planning, execution and close out for event

- Define timeline of planning process for events

1.4 Project Scope

The scope for this project will be limited to researching Greek festivals and the creation of the best practices guide.

Project Includes:

Research of Alaska Greek Festival

Research of Other Greek Festivals in the US

- Specifically Chicago and California festivals of like size

Create a Best Practices guide that will include the following:

- Initiation approval process
- Planning procedures
- Schedule management plan including a timeline for planning
- Financial management plan for festival funds
- Procurement management process
- Stakeholder management plan
- Communication plan for both volunteers, stakeholders and community
- HR/ Volunteer management plan
- Risk management process
- Quality management process
- Change management process
- Set up procedures, including layouts, installation and management best practices
- Clean up procedures
- Close out procedures

Copy of final Best Practice guide will be given to and Festival Chairperson in an electronic format

Project Excludes:

Researching other types of cultural festivals and fairs

Managing the execution of the Greek Festival

Best practice guide does not have to be accepted or implemented by Parish Council or Chairperson

1.5 Critical Success Factors

The critical success factors will be:

Meeting defined milestone deadlines

Access is given to documents relating to previous festivals

1.6 Key Performance Indicators

Key Performance Indicators for this project include:

% of milestones missed

With a threshold not to exceed 34% of total milestones

% of Overdue Project tasks

With a threshold not to exceed 34% of total project tasks

Schedule Performance Index

With a threshold not to fall below .95

1.6 Assumptions

Several assumptions have been identified for the Greek Festival Best Practices Project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

1. Key stakeholder support and involvement in research portion of project
2. Low risk project □ very limited risk management due to nature of research project

1.7 Constraints

Several constraints have been identified for the Greek Festival Best Practices Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified for the project:

1. Deliverable must be complete by April 1st, 2016
2. Project Scope can expand to include additional sections of the Best Practices guide to address the needs of stakeholders
3. Budget can be increased if approved by Project Manager

1.8 Project Risks

Risks that could affect the project are as follows;

Internal:

Access to documents from previous festivals

Cooperation of current and past volunteers

External:

Ability to find information from other Greek Festivals

Greater detail and analysis will be documented in the Risk Registry and the Risk Management plan.

Section 2. Project Authority and Milestones

2.1 Funding Authority

The funding authority for this project is Allison Murrell. As this is a research based project there will be no funding made available.

Cost will be used to help track KPI's. Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

All documents, including the Final Best Practice Guide, will be sent electronically to prevent cost from being incurred.

2.2 Project Oversight Authority

The project advisory committee will be formed to oversee the project planning, execution and review of final deliverables.

They will have oversight and offer guidance on the project from accepting their role on the committee till the project is completed.

2.3 Major Project Milestones

The chart below lists the major milestones for the Greek Festival Best Practices Guide Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project schedule and the Work Breakdown Structure (WBS). If there are any scheduling delays which may affect a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

Milestone/Deliverable	Target Date
Letter of support submitted	9/16/15
Initial research methods approved	10/2/15
IRB Approval	10/23/15
PM Plan Draft submitted for review	11/6/15
PM Plan Approved/ Research Process Approved	11/20/15
Research Complete	1/7/16
Guide Sections I-XIII Drafted	3/31/16
Final Presentation Presented	4/18/16
Final Best Practices Guide Completed	4/18/16

Section 3. Points of Contact

Identify and provide contact information for the primary and secondary contacts for the project.

Role	Name/Title/Organization	Phone	Email
Project Manager	Allison Murrell	317-3198	ammurrell@uaa.alaska.edu
Primary Advisor	LuAnn Piccard	786-1924	lpiccard2@uaa.alaska.edu
Committee Advisor	Roger Hull	786-1924	rk Hull@uaa.alaska.edu
Committee Advisor	Seong Dae Kim	786-1924	sdkim2@uaa.alaska.edu

Section 4. Revision History

Identify document changes.

Version	Date	Name	Description
1	9/11/15	Original	Original Charter



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

2800 O'Malley Road, Anchorage, Alaska, 99507-4256 · Tel: (907) 344-0190 · Fax: (907) 344-9909

September 17, 2015

LuAnn Piccard
University of Alaska Anchorage
Masters of Science in Project Management
3211 Providence Drive
Anchorage, Alaska 99508

RE: Letter of Support for Allison Murrell

Dear Ms. Piccard,

The purpose of this letter is to show support for Allison Murrell's capstone project to create a best practices guide for the annual Greek Festival.

The Greek Festival is the annual fundraiser for the Holy Transfiguration Greek Orthodox Church. The festival is held every August, since 1995, on the church grounds. It is an event designed to raise funds for the new church building, and to provide the opportunity for the community to experience Greek culture and activities, acting as a catalyst for community inclusion and involvement.











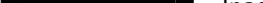













We have been in need of a document that solidifies and clarifies the processes that go into hosting the annual event, and we are excited about working with Allison to build this guide which we hope will further enhance our festival.

































































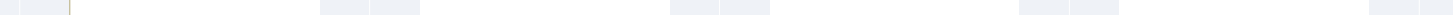















Please feel free to contact us if you have any questions or concerns. My cell number is (907)764-1464.
















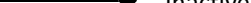








Sincerely,

Angelic Menegatos Pournatzis
Greek Festival Chairperson



















[illegible]

Critical		Split		Finish-only		Baseline Milestone		Manual Summary		Inactive Task	
Critical Split		Task Progress		Duration-only		Milestone		Project Summary		Inactive Milestone	
Critical Progress		Manual Task		Baseline		Summary Progress		External Tasks		Inactive Summary	
Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

ID		Task Mode	WBS	Task Name	Duration	Cost	Start	Finish	Jan 31, '16							Feb 7, '16							Feb 14, '16							Feb 21, '16							Feb 28, '16		
									S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	S	S	M	T		
1			1	Capstone	154 days	\$2,445.00	Tue 9/1/15	Fri 4/1/16																															
2			1.1	PM 686A	65 days	\$893.00	Tue 9/1/15	Mon 11/30/15																															
71			1.2	PM 686B	85 days	\$1,552.00	Mon 12/7/15	Fri 4/1/16																															
72	 		1.2.1	Research	24 days	\$192.00	Mon 12/7/15	Thu 1/7/16																															
77	 		1.2.2	Cross Comparrison spreadsheet US/Canada	2 wks	\$80.00	Fri 2/26/16	Thu 3/10/16																															
78			1.2.3	Deliverables	61 days	\$816.00	Fri 1/8/16	Fri 4/1/16																															
79			1.2.3.1	PPM 1	21 days	\$168.00	Fri 1/8/16	Fri 2/5/16	 100%																														
82			1.2.3.2	PPM 2	15 days	\$120.00	Mon 2/8/16	Fri 2/26/16	 100%																														
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86			1.2.3.4	PPM 3	15 days	\$120.00	Mon 2/29/16	Fri 3/18/16																															
89			1.2.3.5	Go/ No Go Phase Gate #2	0 days	\$0.00	Wed 3/23/16	Wed 3/23/16																															
90			1.2.3.6	PPM 4	5 days	\$40.00	Mon 3/21/16	Fri 3/25/16																															
93			1.2.3.7	Deliverables #1	13 days	\$64.00	Fri 1/8/16	Tue 1/26/16																															
98			1.2.3.8	Deliverable #2	13 days	\$64.00	Wed 1/27/16	Fri 2/12/16	 100%																														
103			1.2.3.9	Deliverable #3	13 days	\$104.00	Mon 2/15/16	Wed 3/2/16																															
108			1.2.3.10	Deliverable #4	11 days	\$64.00	Thu 3/3/16	Thu 3/17/16																															
113			1.2.3.11	Deliverable #5	10 days	\$64.00	Fri 3/18/16	Thu 3/31/16																															
118			1.2.3.12	Finalize guide	1 day	\$8.00	Fri 4/1/16	Fri 4/1/16																															
119			1.2.4	Presentation and Paper	48 days	\$464.00	Wed 1/27/16	Fri 4/1/16																															
120			1.2.4.1	Presentation	43.5 days	\$104.00	Wed 1/27/16	Mon 3/28/16																															
121			1.2.4.1.1	Draft presentation	10 days	\$80.00	Wed 1/27/16	Fri 3/18/16																															
122			1.2.4.1.2	Edit presentation	2 days	\$16.00	Fri 3/18/16	Tue 3/22/16																															
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126			1.2.4.2.1	Draft paper	20 days	\$160.00	Mon 2/1/16	Fri 2/26/16	 100%																														
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Task		Start-only		Baseline Split		Summary		External Milestone		Deadline	

ID		Task Mode	WBS	Task Name	Duration	Cost	Start	Finish					Mar 6, '16				Mar 13, '16				Mar 20, '16				Mar 27, '16												
									W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M		T	W	T	F	S			
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Change Control Log

Project	Greek Festival Event Management Plan	Project #	
Project Manager	Allison Murrell	Sponsor	
Project Artifacts		Updated	Original draft

[illegible]

Change Request Form

Changes are an inevitable part of projects. While changes can be disruptive, they are far better than to deliver the wrong thing! This simple change request also turns into an analysis sheet once it is submitted.

Name of Project:	Greek Festival Practices Guide		
Name of Requestor:	Allison Murrell		
Summary of Request			
Replace "California and Chicago Greek festivals" with "US and Canada" in research			
Reason for Request			
Get better data that is more generalized, but could be used later to find similar festivals, based on size, cost, revenue, program, etc.			
Impact of Change			
Will increase the academic level of research. Take from very broad general knowledge to large data pool.			
Project Team Use Only			
Change Request ID	001	Assigned To: AM	
Analysis Due	26/01/2016	Support Resources	N/A
Analysis Summary			
Good Plan. Better to have a shallow and wide pool than a narrow and shallow pool.			
Recommended Action	Approve	Project Manager	Allison Murrell
PM Decision	Approve	Date	26/01/2016
Requestor Advised	26/01/2016	Project Plan Updated	29/01/2016

Guidelines:

- **Name of Project:** The project for which the change is being requested
- **Name of Requestor:** The person who is asking for the change to be made
- **Summary of Request:** The description of the request that is being asked for. This should be as detailed as necessary to allow the project team to understand exactly what is being requested. It should clarify any of the following that apply:
 - Scope changes
 - Schedule changes
 - Budget changes
 - Quality standard changes
 - Risk tolerance changes
 - Specific resource changes
- **Reason for Request:** The background and explanation to the request. This should explain why the request is important to the project and should highlight the benefits that will be gained by incorporating the change into the initiative. In conjunction with the next field (Impact if Change is Not Made), it will provide the logic for the request being made
- **Impact if Change is Not Made:** The repercussions for the project if the change is not approved. This should be a realistic assessment and should focus on challenges with the project's ability to meet its goals; ultimately, the decision on whether to approve or reject will (at least in part) come down to the costs identified here versus the costs of making the change. This field combines with the previous field (Reason for Request) to provide the logic for the request being made.

The remaining fields are for the use of the project team in assessing the request:

- **Change Request ID:** The request should be logged in a change log and a unique identifier assigned that will assist with tracking. All documentation associated with the change should carry this ID.
- **Assigned To:** The person assigned to carry out or to lead the analysis. This person should be viewed as the change request owner and should be the person who has the greatest understanding of the area(s) of the project that are impacted and the extent of that impact. See also Support Resources below.
- **Analysis Due:** The date by which the owner/person that the analysis is assigned to needs to have completed their analysis and provided a recommendation to the project manager for submission to the change control board. This date should be determined by the owner and project manager in partnership and should reflect the unique circumstances of each change; arbitrary timelines will not be successful.
- **Support Resources:** Additional team members and/or stakeholders who will assist the change owner in conducting the analysis. These may not be required for every change, but for more complex requests these individuals will be invaluable. Individuals should be identified rather than teams to drive accountability.
- **Analysis Summary:** The summary of the work carried out by the owner and any support resources. This should focus on the impact of the change to the project constraints (including quality and risk) and should also reflect areas of uncertainty where the impact may be larger than has been able to assess accurately within the analysis period. This area should also consider the impact to the deliverables if the change is not approved.
- **Recommended Action:** This is the recommendation of the change owner.
- **Project Manager:** The PM should put their name to the recommended action to indicate that they have discussed the change with the owner after the analysis has been completed; they are in agreement with the recommendation that is going to the change control board.
- **Change Board Decision:** The decision reached by the change control board or equivalent governance function after reviewing the request and analysis.
- **Change Board Date:** The date that the change control board decision is made.
- **Requestor Advised:** The date that the person requesting the change is advised of the change control board decision. This is the accountability of the project manager although they may delegate responsibility to a member of the team (commonly the team's change owner).
- **Project Plan Updated:** The date when all of the changes to the project plan have been made (if necessary) after the change control board's decision. This is the accountability of the project manager.

Change Request Form

Changes are an inevitable part of projects. While changes can be disruptive, they are far better than to deliver the wrong thing! This simple change request also turns into an analysis sheet once it is submitted.

Name of Project:	Greek Festival Event Management Plan		
Name of Requestor:	Allison Murrell		
Summary of Request			
Replace " <i>Best Practices Guide</i> " with " <i>Event Management Plan</i> ".			
Reason for Request			
More accurately reflect needs of Sponsor.			
Impact of Change			
Will increase the usability of final document and help them to reach their goals.			
Project Team Use Only			
Change Request ID	001	Assigned To: AM	
Analysis Due	2/20/16	Support Resources	N/A
Analysis Summary			
Good Plan. Added more work, but enough float to not impact completion data.			
Recommended Action	Approve	Project Manager	Allison Murrell
PM Decision	Approve	Date	2/16/16
Requestor Advised	2/17/16	Project Plan Updated	2/17/16

Guidelines:

- **Name of Project:** The project for which the change is being requested
- **Name of Requestor:** The person who is asking for the change to be made
- **Summary of Request:** The description of the request that is being asked for. This should be as detailed as necessary to allow the project team to understand exactly what is being requested. It should clarify any of the following that apply:
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 - Schedule changes
 - Budget changes
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- **Reason for Request:** The background and explanation to the request. This should explain why the request is important to the project and should highlight the benefits that will be gained by incorporating the change into the initiative. In conjunction with the next field (Impact if Change is Not Made), it will provide the logic for the request being made
- **Impact if Change is Not Made:** The repercussions for the project if the change is not approved. This should be a realistic assessment and should focus on challenges with the project's ability to meet its goals; ultimately, the decision on whether to approve or reject will (at least in part) come down to the costs identified here versus the costs of making the change. This field combines with the previous field (Reason for Request) to provide the logic for the request being made.

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- **Analysis Due:** The date by which the owner/person that the analysis is assigned to needs to have completed their analysis and provided a recommendation to the project manager for submission to the change control board. This date should be determined by the owner and project manager in partnership and should reflect the unique circumstances of each change; arbitrary timelines will not be successful.
- **Support Resources:** Additional team members and/or stakeholders who will assist the change owner in conducting the analysis. These may not be required for every change, but for more complex requests these individuals will be invaluable. Individuals should be identified rather than teams to drive accountability.
- **Analysis Summary:** The summary of the work carried out by the owner and any support resources. This should focus on the impact of the change to the project constraints (including quality and risk) and should also reflect areas of uncertainty where the impact may be larger than has been able to assess accurately within the analysis period. This area should also consider the impact to the deliverables if the change is not approved.
- **Recommended Action:** This is the recommendation of the change owner.
- **Project Manager:** The PM should put their name to the recommended action to indicate that they have discussed the change with the owner after the analysis has been completed; they are in agreement with the recommendation that is going to the change control board.
- **Change Board Decision:** The decision reached by the change control board or equivalent governance function after reviewing the request and analysis.
- **Change Board Date:** The date that the change control board decision is made.
- **Requestor Advised:** The date that the person requesting the change is advised of the change control board decision. This is the accountability of the project manager although they may delegate responsibility to a member of the team (commonly the team's change owner).
- **Project Plan Updated:** The date when all of the changes to the project plan have been made (if necessary) after the change control board's decision. This is the accountability of the project manager.

Greek Festival Best Practices Guide Project Communication Matrix

[illegible]

Greek Festival Stakeholder Registry								
	Name	Role	Communication form	Interest	Power	Notes	Major Concerns	Relationship Manager
1	Allison Murrell	PM	Every way possible	4	4	Super awesome	Maintain pos relationships	Self
2	Angelic Pournatzis	Chairperson	Meetings, Email	4	4	Hard working rock stars	Project is done well	PM
3	Bill Kapadis	President Parish Council	Email	2	2	Very interested	Project is done well	PM
4	Father Vasilios	Priest	Meetings	3	2	Very supportive	Using project for other events	PM
5	Committee	Advisers	Email, meetings	4	4	Supportive and involved	Completion of project	PM
6	Parish	Church members/ Greeks	Word of mouth, flyers	1	2	Interested; positive	Project helps/ is useful	PM
7								
8								

Power/ Interest matrix				
				1,2,5
6		3	4	
	1	2	3	4 Interest

Research plan and what is include and excluded

1. Research plan
 - a. Background information
 - i. What is already known
 - b. Research goals
 - i. Research current Greek Festival TOC outline
 1. Additional information/ sections can be added based on research
 - c. Methodology
 - i. Descriptive research
 1. The status quo and Best Practices currently in use
 - ii. Data
 1. Information from the digital drop box
 2. Volunteers' documentation
 3. Documents and information from other Greek Festivals
 - iii. Barriers and pitfalls
 1. Data collection system may be incomplete
 2. Volunteers may not want to document processes and procedures
 - iv. Fieldwork and timeframe
 1. Fieldwork at the Orthodox Church
 2. Starting December 7, 2015 till at least January 7, 2016
 3. May have follow up request still coming in from initial research
 - d. Outcomes and expectations
 - i. Enough information to begin drafting Greek Festival Best practices guide
 - e. Timeframe for research
 - i. Data collection
 1. December 7, 2015 to January 7, 2016
 - ii. Review and analysis
 1. January 7, 2016 to March 30, 2016
 - iii. Submission of final document
 1. April 18, 2016 (Approximately)
2. Included
 - a. Greek festivals across America
 - i. US and Canada
 - ~~i. —Emphasis on Chicago and California~~
 1. If pertinent information can be found
 - ii. Answer these questions
 1. When are festivals?
 2. Length (in days) of festivals?
 3. Heat map of where festivals are
 4. Average age of annual festivals
 5. Scatterplot of age and # of visitors
 6. Average costs of similar items
 - a. Gyro, greek coffe, ect.

- b. Lean
 - i. Tools, Techniques and practices
 - 1. For application of practices on the plan, and to be included within the metrics plan for future analysis
- 3. Excluded
 - a. Non- Greek cultural based festivals and fairs

Research Sources and Keywords

1. Sources

- a. Greek Festival Digital Dropbox
- b. Church's records/ QuickBooks
- c. Festival Chairperson's documentation
- d. Festival subcommittee members documentation
- e. Festival booth team leaders documentation
- f. Google for other similar seized Greek Churches with Greek/ cultural festivals
- g. American Hellenic Educational Progressive Association (AHEPA)
- h. Lean
 - i. <http://www.leanproduction.com/>
 - ii. www.mindtools.com/
 - iii. <http://www.qualitymeasures.ahrq.gov/expert/expert-commentary.aspx?id=32943>
 - iv. "The Ultimate Guide to Business Process Management: Everything you need to know and how to apply it to your organization" by Theodore Panagacos
 - v. "Lean Six Sigma for Service : How to Use Lean Speed and Six Sigma Quality to Improve Services and Transactions" by Michael George
 - vi. "Lean Six Sigma For Beginners: A Quickstart Beginner's Guide To Lean Six Sigma" by G. Harver
 - vii. "The Lean Six Sigma Pocket Toolbook: A Quick Reference Guide to 100 Tools for Improving Quality and Speed" by Michael L. George

2. Key words

- a. Greek Festival
- b. Greek Orthodox churches in America
- c. Event planning for Greek
- d. Greek Culture
- e. Cultural Festival/ Event
- ~~f. Chicago Greek Festival~~
 - ~~i. Taste of Greek town~~
 - ~~ii. Lincoln Park Greek Fest~~
 - ~~iii. St. Andrews Greek Festival~~
 - ~~iv. Cold Coast Greek Festival~~
 - ~~v. St. Demetrios Greek Festival~~

~~vi. Big Fat Greek Festival of Niles (outside of Chicago)~~

~~g. California Greek Festival~~

~~i. LA Greek Fest~~

~~ii. Sac Greek Festival~~

~~iii. Hellenic Festival~~

~~iv. OC Greek Festival~~

~~v. Valley Greek Festival~~

~~vi. Oakland Greek Festival~~

~~vii. Fresno Greek Festival~~

~~h.f.~~ Greek Orthodox church event

~~i.g.~~ Lean

- i. Lean Quality Improvement
- ii. Lean tools and techniques
- iii. Lean Application
- iv. Lean Processes
- v. Applying Lean tools
- vi. Lean templates
- vii. How to use Lean techniques/ tools

Greek Festival Best Practices Guide Project Risk Registry, Analysis and Implementation

Risk Rank & ID		Risk Statement & Category			Risk Analysis Matrix								Risk Response Strategy and Implementation	
Risk Rank	Unique ID #	Risk Statement	Risk Category		Risk Probability	Risk Impact		Schedule Score	Cost Score	Final Score	Quantitative Risk Impact		Risk Response Strategy	Implementation
			Initial Risk Owner	Risk May Occur In		Schedule	Cost				Schedule Impact (Days)	Cost Impact (\$)		
	2	Lack of information online	AM		3	2	1	6	3	9	2 weeks	\$ 200	Mitigate: Start research as soon as possible, get help from Librarians and advisors if needed	
	3	Lack of stakeholder involvement	AM		2	3	1	6	2	8	3 weeks	\$ 60	Mitigate: create positive environment with open collaboration and active engagement	
	6	Chairperson's support is lost	AM		1	4	1	4	1	5	2 months	\$ 325	Prevent: Maintain positive relationship with collaboration and active engagement	
	7	Stakeholders become unsupportive/ negative	AM		1	4	1	4	1	5	3 weeks	\$ 225	Mitigate: create positive engagement with open collaboration and active engagement	
	9	Scope is increased	AM		2	1	1	2	2	4	1 month	\$ 500	Transfer: Use others as tool to prevent scope creep. If required, run through change process first to justify	
	11	Unforeseen expenses	AM		1	1	1	1	1	2	1 day	\$ 500	Use change process to decide if expense is truly necessary	
	1	Lack of access to documents	AM		2	4	1	8	2	10	1 month	\$ 50	Work with chair/subcommittee to get access	Did not happen
	5	Can't connect to digital drop box	AM		3	1	1	3	3	6	5 days	\$ 12	Accept: Work with IT to get access	Did not happen
	8	Missing Documents	AM		2	1	1	2	2	4	2 weeks	\$ 100	Track down people; asks for help in finding or recreating paperwork	Did not happen
	10	Delays in access to digital drop box	AM		1	2	1	2	1	3	3 days	\$ 10	Accept	Did not happen
	4	IRB is rejected	AM		2	3	1	6	2	8	0	\$ -	Risk was eliminated - No response needed	N/A

September 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 Labor Day	8 Email Deliverables to Committee Meet with LuAnne	9	10 Committee Response	11 PPM 1 Due	12
13 Grandparents Day Rosh Hashanah	14	15	16	17 Present Project to Parish Council	18	19
20	21 Email Deliverables to Committee	22 Yom Kippur	23 Committee Response Autumn Begins	24	25	26
27	28	29	30			

October 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2 PPM 2 Due	3
4	5 Email Deliverables to Committee	6 Meet with LuAnne	7 Committee Response	8	9	10
11	12 Columbus Day	13	14	15	16	17
18	19 Email Deliverables to Committee	20 Meet with LuAnne	21 Committee Response	22	23 PPM 3 Due	24
25	26	27	28	29	30	31 Halloween

November 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Daylight Savings Ends	2 Email Deliverables to Committee	3 Meet with LuAnne	4	5	6	7
8	9	10	11 Veterans Day	12	13	14
15	16 Email Deliverables to Committee	17 Meet with LuAnne	18 Committee Response	19	20 PPM 4 Due	21
22	23	24	25	26 Thanksgiving	27	28
29 Final Presentation Submitted	30 PRESENTATION					

December 2015

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 PRESENTATION	2	3	4	5
6 Hanukkah	7 Updates/ Final Materials Submitted Start Research	8 Meet with LuAnne?	9	10	11	12
13	14	15	16	17	18	19
20	21	22 Winter Begins	23	24	25 Christmas Day	26 Kwanzaa
27	28	29	30	31 New Year's Eve		

January 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 New Year's Day	2
3	4	5	6	7	8	9
10	11 Email Deliverables to Committee Classes begin	12	13 Committee Response	14	15	16
17	18 Martin Luther King, Jr. Day	19	20	21	22 Class 1	23
24	31	25 Email Deliverables to Committee	26	27 Committee Response	28	29
					30	

February 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2 Groundhog Day	3	4	5 PPM 1	6
7	8 Email Deliverables to Committee Chinese New Year	9	10 Committee Response Ash Wednesday	11	12 Lincoln's Birthday Class 2	13
14 St. Valentine's Day	15 President's Day	16	17	18	19	20
21	22 Email Deliverables to Committee	23	24 Committee Response	25	26 PPM 2	27
28	29					

March 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2 Go/ No Go 5PM	3	4 Class 3	5
6	7 Email Deliverables to Committee	8	9 Committee Response	10	11 Joint Class	12
13 Daylight Savings Begins	14 SPRING BREAK WEEK	15	16	17 St. Patrick's Day	18 PPM 3	19
20 Spring Begins Palm Sunday	21 Email Deliverables to Committee	22	23 Committee Response Go/ No Go 5PM Purim	24	25	26
27 Easter Sunday	28	29	30	31		

April 2016

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Class 4 April Fool's Day Substantial Completion	2
3	4 Email Deliverables to Committee	5	6 Committee Response	7	8 PPM 4	9
10	11	12	13	14	15	16
17	18 Final Presentation Due 8AM Oral Defense?	19 Oral Defense?	20	21	22 Passover Earth Day	23
24	25 All Deliverables Submitted on Blackboard 5:30PM	26 Final Binder Delivered to Office 5:30PM	27 Final Grades?	28	29	30 Hooding Ceremony!

Expectations for PM 686A and 686B Capstone Project Advising

Student Name: Alison Howell PM 686A or PM 6896B (Circle one) Semester: Fall 18

Area of Responsibility	Student	Primary Advisor (1 person)	Committee Members (2 people)	Instructor of Record (IOR) and Admin Staff
Project Management	PRIMARY OWNER	Coaching, feedback and assessment	Coaching, feedback and assessment input	
Communication and Stakeholder Management	<ul style="list-style-type: none"> • Clear description of project • Proactive selection of Advisor and Committee members • Demonstrate effective communication and stakeholder management by determining and coordinating necessary and agreed modes and setting expectations for timing, and emphasis or tailoring of feedback and communication across with PA and committee (and other stakeholders) • Provide regular status reports as agreed with PA and committee • Identify and resolve communication issues • Identify, balance and resolve 	<ul style="list-style-type: none"> • Email confirmation of agreement to serve • Availability as agreed 	<ul style="list-style-type: none"> • Email confirmation of agreement to serve • Availability as agreed 	<ul style="list-style-type: none"> • Faculty specialties matrix • Session Lectures • Syllabus • Blackboard materials • Announcements • AV set up • Final presentation schedule and logistics • Student and committee support as requested • Adjunct Faculty appointment letters • Escalation path

	contradictory inputs <ul style="list-style-type: none"> • Discuss and get signatures for "Expectations" from student, advisor and committee members and submit to PM office. 			
Project Deliverables	<ul style="list-style-type: none"> • Complete work per syllabus • Incorporate feedback from PA, committee and stakeholders 			
Feedback	<ul style="list-style-type: none"> • Determine type, timing and format of feedback from PA and committee • Solicit, coordinate and integrate feedback from stakeholders, PA and committee for PPMs and final project deliverables • Identify, balance and resolve contradictory inputs 	Provide agreed feedback on timely basis	Provide agreed feedback on timely basis	
Final Presentation	<ul style="list-style-type: none"> • Prepare • Present 	<ul style="list-style-type: none"> • Attend • Provide Feedback 	<ul style="list-style-type: none"> • Attend • Provide Feedback 	<ul style="list-style-type: none"> • Coordinate schedule and logistics
Assessment and Grading		<ul style="list-style-type: none"> • Coordinate input from committee for 4 PPMs and final 	Provide input to primary advisor for: 4 PPMs Final deliverables	<ul style="list-style-type: none"> • Input 4 PPMs and final deliverables scores to Blackboard

		project deliverables <ul style="list-style-type: none"> • Assignment of PPM scores • Provide scores to IOR • Go/No checkpoint recommendation • Assign final grade 	Go/No checkpoints	<ul style="list-style-type: none"> • Ensure consistency across students • Communicate go/no-go decisions to students • Input final grade to UA Online
Administrative Documents	<ul style="list-style-type: none"> • GSP preparation and submission to PM Office • Signed Expectations agreement • IRB submittal (686A) • Apply for graduation (686B) • RSVP for Hooding and commencement (686B) 			<ul style="list-style-type: none"> • Graduate Studies Plan (GSP signatures and processing) • Include signed "Expectations" form in student file. • DF paperwork and annual progress report for students • Graduation Audit • Graduation Requirement Report (GRR) • Archive final project deliverables

Student is responsible for obtaining the following signatures and submitting completed form to PM office to include in student file.

I understand and agree to the expectations described above:

Student Signature:  Date: 9-4-15

Advisor Signature:  Date: Oct 1, 2015

Committee Member:  Date: 21 Sept 2015

Committee Member:  Date: 10/1/2015

Committee Submission Matrix

Task	9/8/2015	9/21/2015	10/5/2015	10/19/2015	11/2/2015	11/16/2015
Admin						
Graduate Studies Plan	X					
Submit to Meuy	X					
Confirm Approval	X					
Get signatures?	X					
Committee Members						
Create deliverable schedule for	X					
Send out deliverable schedule to	X					
Abstract	X		X			
Letter of Support						
Knowledge Areas						
Application and performance	X	X	X	X		
Description and measure	X	X	X	X		
Mesurementn data	X	X	X	X		
Lessons learned narrative	X	X	X	X		
Internal Review Board					11/6/15 Submition date	
Register for class			X			
Take Class			X			
Fill out paperwork			X			
Send in Paperwork for review				X		
Define method for measuring	X					
Craft a method	X					
Research Plan						
Description of what kind of		X	X	X		
Define what will be included/		X	X	X		
Research Sources and Key Words		X	X	X		
Advisory approved research methods		X			X	Approval
Description of Project deliverables	X	X	X			
Requirements Documentation	X	X				
Table of Contents for PM Plan and Final	X	X				
PM Plan					X	X
Charter					X	X
Project Objectives	X				X	X
Scope Statement	X	X			X	X
Objectives/ Outcomes	X				X	X
Assumptions/ Constraints	X				X	X
Milestones	X				X	X
Metrics/ KPI	X				X	X
Critical Success Factors	X				X	X
Stakeholder Management		X			X	X
Stakeholder Registry	X	X			X	X
Stakeholder Analysis	X	X			X	X
Time Management		X			X	X
WBS	X	X			X	X
Gantt Chart	X	X			X	X
Change Management Plan			X	X		X
Risk Management Plan			X	X		X
Risk Registry and Analysis			X	X		X
Cost Management Plan			X	X		X
Quality Management Plan			X	X		X
HR Management Plan			X	X		X
Requirements Traceability Matrix			X	X		X
Communication Management Plan			X	X		X
Procurement Management plan			X	X		X
Close out documents						
Status Reports	X	X	X	X	X	X
Lessons Learned Narrative					X	X
Presentation						
Final Presentation			X	X	X	X

**Greek Festival Best Practices Guide Project
Resource Assignment Matrix**

WBS	Project Task	Sponsor	Project Manager	Primary Adviser	Committee Members
1	Capstone				
1.1	PM 686A				
1.1.1	Admin				
1.1.1.1	Graduate Studies Plan				
1.1.1.1.1	Submit to Meuy		R		
1.1.1.1.2	Confirm Approval		R		
1.1.1.1.3	Get signatures?		R	A	A
1.1.1.2	Committee Members				
1.1.1.2.1	Submit Request		R		
1.1.1.2.2	Print Approval		R		
1.1.1.2.3	Meet with Primary		R	C	
1.1.1.2.4	Create deliverable schedule for their review		R		
1.1.1.2.5	Send out deliverable schedule to committee members		R	C	
1.1.1.3	Abstract				
1.1.1.3.1	Draft		R		
1.1.1.3.2	Edit		R	C	
1.1.1.3.3	Final		R	C	
1.1.1.4	Letter of Support				
1.1.1.4.1	Contact Parish Council/ Father Vasili	R	R		
1.1.1.4.2	Receive letter	R	R		
1.1.1.4.3	Submit letter	I	R	A	A
1.1.2	Knowledge Areas				
1.1.2.1	Stakeholder Management				
1.1.2.1.1	Draft		R		
1.1.2.1.2	Edit		R	C	C
1.1.2.1.3	final		R	C	C
1.1.2.1.4	Submit		R	I	I
1.1.2.2	Quality Management				
1.1.2.2.1	Draft		R		
1.1.2.2.2	Edit		R	C	C
1.1.2.2.3	Final		R	C	C
1.1.2.2.4	Submit		R	I	I
1.1.2.3	Communication Management				
1.1.2.3.1	Draft		R		
1.1.2.3.2	Edit		R	C	C
1.1.2.3.3	Final		R	C	C
1.1.2.3.4	Submit Paper		R	I	I
1.1.2.4	HR Management				
1.1.2.4.1	Draft		R		
1.1.2.4.2	Edit		R	C	C
1.1.2.4.3	final		R	C	C
1.1.2.4.4	Submit Paper		R	I	I
1.1.2.5	Compile KA and submit as Final		R	I	I
1.1.3	Internal Review Board				
1.1.3.1	Register for class		R		
1.1.3.2	Take Class		R	I	I
1.1.3.3	Fill out paperwork		R	C	C
1.1.3.4	Send in Paperwork for review		R	C	C
1.1.3.5	Wait for review		R	I	I
1.1.3.6	Edit and make corrects		R		
1.1.3.7	Submit/ wait for paperwork review from IRB		R	C	C
1.1.3.8	Approved/ Rejected		I	I	I
1.1.3.9	Reject- Revise and resubmit		R	I	I
1.1.3.10	Define method for measuring project progress				
1.1.3.10.1	Craft a method		R	I	I
1.1.3.10.2	Review with committee		R	C	C
1.1.4	Project Deliverables				
1.1.4.1	Research Plan				
1.1.4.1.1	Description of what kind of research, preferred methods		R	I	I
1.1.4.1.2	Define what will be included/ excluded		R	I	I
1.1.4.1.3	Define research sources and keywords		R	I	I
1.1.4.1.4	Submit to Advisors for approval		R	C	C
1.1.4.1.5	Wait for approval		I	R	R
1.1.4.1.6	Go/ No Go		I	R	R
1.1.4.2	PPM #1				
1.1.4.2.1	Draft PPM docs		R		
1.1.4.2.2	Edit PPM docs		R		
1.1.4.2.3	Submit to committee		R	C	C

Legend

Responsible	R
Accountable	A
Consulted	C
Informed	I

1.1.4.2.4	Wait for comments		R	I	I
1.1.4.2.5	Edit final docs		R		
1.1.4.2.6	Submit docs to Blackboard		R	I	I
1.1.4.3	PPM #2				
1.1.4.3.1	Draft PPM docs		R		
1.1.4.3.2	Edit PPM docs		R		
1.1.4.3.3	Submit to committee		R	C	C
1.1.4.3.4	Wait for comments		R	I	I
1.1.4.3.5	Edit final docs		R		
1.1.4.3.6	Submit docs to Blackboard		R	I	I
1.1.4.4	PPM #3				
1.1.4.4.1	Draft PPM docs		R		
1.1.4.4.2	Edit PPM docs		R		
1.1.4.4.3	Submit to committee		R	C	C
1.1.4.4.4	Wait for comments		R	I	I
1.1.4.4.5	Edit final docs		R		
1.1.4.4.6	Submit docs to Blackboard		R	I	I
1.1.4.5	PPM #4				
1.1.4.5.1	Draft PPM docs		R		
1.1.4.5.2	Edit PPM docs		R		
1.1.4.5.3	Submit to committee		R	C	C
1.1.4.5.4	Wait for comments		R	I	I
1.1.4.5.5	Edit final docs		R		
1.1.4.5.6	Submit docs to Blackboard		R	I	I
1.1.4.6	Presentation				
1.1.4.6.1	Draft		R		
1.1.4.6.2	Edit		R	C	C
1.1.4.6.3	Final		R	I	I
1.1.4.6.4	Present Presentation		R	I	I
1.1.5	Submit Final Documents for Class		R	I	I
1.2	PM 686B				
1.2.1	Research				
1.2.1.1	Research Festival History	I	R		
1.2.1.2	Research Other Greek Festivals	I	R		
1.2.1.3	Conversation with stakeholders	I	R		
1.2.2	Deliverables				
1.2.2.1	Deliverables #1				
1.2.2.1.1	Draft guide section I Charter		R		
1.2.2.1.2	Edit guide		R		
1.2.2.1.3	Submit to Committee for review		R	C	C
1.2.2.1.4	Review comments and update guide	I	R	I	I
1.2.2.2	Deliverable #2				
1.2.2.2.1	Draft Guide section ii and iii		R		
1.2.2.2.2	Edit Guide		R		
1.2.2.2.3	Submit to Committee for review		R	C	C
1.2.2.2.4	Review comments and update guide	I	R	I	I
1.2.2.3	Deliverable #3				
1.2.2.3.1	Draft Guide section iv, v and iv		R		
1.2.2.3.2	Edit sections		R		
1.2.2.3.3	Submit to Committee for review		R	C	C
1.2.2.3.4	Review comments and update guide	I	R	I	I
1.2.2.4	Go/ No Go Phase Gate		I	R	R
1.2.2.5	Deliverable #4				
1.2.2.5.1	Draft guide sections vii, viii, ix, x		R		
1.2.2.5.2	Edit sections		R		
1.2.2.5.3	Submit to Committee for review		R		
1.2.2.5.4	Review comments and update guide	I	R		
1.2.2.6	Deliverable #5				
1.2.2.6.1	Draft section xi, xii, xiii		R		
1.2.2.6.2	Edit guide		R		
1.2.2.6.3	Submit to Committee for review		R	C	C
1.2.2.6.4	Review comments and update guide	I	R	I	I
1.2.2.7	Compile Guide				
1.2.2.7.1	Compile guide and review for constituency	I	R		
1.2.2.7.2	Submit to Committee for review	I	R	C	C
1.2.2.7.3	Review comments and update guide	I	R	I	I
1.2.2.8	Finalize guide	I	R	C	C
1.2.2.9	Presentation				
1.2.2.9.1	Draft presentation		R		
1.2.2.9.2	Edit presentation		R		
1.2.2.9.3	Submit to Committee for review		R	C	C
1.2.2.9.4	Review comments and update presentation	I	R	I	I
1.2.2.9.5	Present Presentation	I	R	C	C
1.2.3	Submit Final Paperwork				
1.2.3.1	Project Complete	I	R	I	I

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 9/11/15 _____


Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project				Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival				<i>Key tasks completed and key tasks started.</i> Completed: Abstract written Method for project progress and KPI's defined Scope defined Milestones and Critical Success Factors defined Knowledge areas selected Started: Stakeholder, Time and HR management plan for project drafted and reviewed Meetings with key stakeholders schedule	
Current Status				Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> PPM #1 deliverables submitted on time with the exception of the Letter of Support which was delayed due to car accident KPI: 1 overdue task – Support Letter. SPI: 1 Earned as much as we planned			X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; next big thing is IRB registration and class, defining research methodology and drafting IRB paperwork. Also PPM#2 documents; Signed GSP, Final abstract, and Final Charter/Stakeholder/ Time plans	
Anticipated Changes/Key Risks/Corrective Actions				Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Keeping key stakeholders engaged and positive about project Getting access to pervious years documents				<i>Wrap up with key items and where help needed from stakeholders.</i> Need help with MS Project schedule Need help with KPI's and metrics	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 10/9/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> Completed: Draft of research plan and key words PPM #2 Committee submittals #2 and 3 Started: IRB Training Class modules Documents for PPM #3	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> 32% duration passed and 43% work completed PPM #2 deliverables submitted on time SPI: 1 % of Milestone Missed: 0% 0 out of 18 % of Overdue Tasks: 0% 0 out of 144		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; ahead on PPM #3, the next big milestone Behind in training classes but will make 10/23/15 deadline Also figured out the KA's	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty? Changes: Updating metrics to have meaningful measurements Updating the KA's to have more meaning and usefulness		<i>Wrap up with key items and where help needed from stakeholders.</i> Need help in crafting clear metrics that have meaning for both project and for KA's	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 10/9/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> Completed: Completed and passed the IRB training Started: Application of Lean tools to analyze processes of festival PPM #4 submittal in process of being drafted	
Current Status	<div><div></div><div></div><div></div><div>X</div></div>	Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Ahead; saved several days since we don't have to submit IRB plan and wait for approval		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; Working on PPM and no big risk ahead	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty? Changes: Updated metrics to have meaningful measurements Considering updating CSF to have more meaning		<i>Wrap up with key items and where help needed from stakeholders.</i> Really excited about Lean tools and applying them in my project	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 11/6/15 _____

Project Title: Greek Festival Best Practices Handbook _____

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> Completed: PPM #3 Started: Application of Lean tools to analyze processes of festival PPM #4 submittal in process of being drafted Presentation Drafted final presentation	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Ahead; saved several days since we don't have to submit IRB plan and wait for approval Using time to do Lean analysis SPI:1 CPI:1 Millstone missed: 0 Overdue task: 0		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes; Going great. PPM #4 and research plan approval are expected soon Working on storytelling for presentation	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Risks: Jury Duty→ Very little impact; short trial Changes: Added Lean analysis to project Considering updating CSF to have more meaning		<i>Wrap up with key items and where help needed from stakeholders.</i> Really excited about Lean tools and applying them in my project	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell Date: 1/22/16

Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival		<i>Key tasks completed and key tasks started.</i> <i>Research is complete.</i> <i>Charter has been drafted and submitted for review by committee and Sponsor.</i>	
Current Status		Forecast	
<div> <div></div> <div></div> <div></div> <div>X</div> </div> <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Charter drafted, and with Sponsor for review. Financial plan drafted. Schedule and plan drafted. SPI: .89 CPI: 1.11		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Yes; ahead of schedule. Deliverable I being reviewed and most of Deliverable II drafted.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead.		<i>Wrap up with key items and where help needed from stakeholders.</i> <i>Project is going swimmingly. Only concern is stakeholder management when it comes to processes mapping the booths next month.</i>	

One Page PM 686A Project Status Report Dashboard

Name: Allison Murrell _____ Date: 2/12/16 _____

Project Title: Greek Festival Best Practices Guide

Synopsis of Project				Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival				<i>Key tasks completed and key tasks started.</i> Completed drafts of section III and III. Submitted PPM #1	
Current Status				Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> Financial plan in review. Schedule and plan in review. Risk drafted. Stakeholder drafted. Communication drafted. SPI: 1.0 CPI: 1.11			X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> Yes. Continuing forward.	
Anticipated Changes/Key Risks/Corrective Actions				Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead. Working with busy sponsor/ stakeholders can be frustrating.				Stakeholders are excited but busy. Tring to nail down meetings is harder than it should be.	

One Page PM 686B Project Status Report Dashboard

Name: Allison Murrell Date: 3/4/16


Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create a best practices handbook for local Greek festival.		<i>Key tasks completed and key tasks started.</i> <i>Research is complete. Analysis has been drafted.</i> <i>Deliverable III has been drafted.</i>	
Current Status		Forecast	
<div> <div></div> <div></div> <div></div> <div>X</div> </div> <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Communication, Risk and Stakeholder plans for festival drafted Research cross-comparison spreadsheet complete SPI:1 CPI: 1		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Yes; ahead of schedule. Deliverable III has been drafted. Cross-comparison spreadsheet was completed 11 days ahead of schedule.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Taken several "pauses" so I don't get to far ahead. May rename project – not sure. Still thinking about it.		<i>Wrap up with key items and where help needed from stakeholders.</i> <i>Project is going very well. Have a festival kick-off meeting where I'm planning to corner a few people to get some review of documents and get some information and opinions.</i>	

One Page PM 686B Project Status Report Dashboard

Name: Allison Murrell _____ Date: 4/1/16 _____

Project Title: Greek Festival Best Practices Guide

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> Research and create an event management plan for local Greek festival		<i>Key tasks completed and key tasks started.</i> <i>Final event management plan is complete.</i>	
Current Status		Forecast	
 <i>Where am I now? Am I on track to meet next PPM deliverables?</i> Deliverable complete.		<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <i>Substantial Completion has been met.</i>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> Finishing edits for compiled event plan. Working on final PM #4, and presentation.		<i>Working on presentation. Would like to do run through in classroom if possible.</i>	

PROJECT CHARTER

Greek Festival Best Practices Guide

VERSION: 2

REVISION DATE: 12/2/2015

Approval of the Project Charter indicates an understanding of the purpose and content described in this document. By signing this document, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Allison Murrell	PM		11/20/15

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Section 1. Project Overview

1.1 Problem Objective

Every year, in late August, the Holy Transfiguration Greek Orthodox Church hosts the annual Alaska Greek Festival. The Parish Council, along with a chair person, organize, plan and execute the large multi-day event to raise funds for the building of the new church, to invite the community to experience some Greek culture.

There is a need to take the institutional knowledge from the Parish Council and the Chairperson, clarify that knowledge and place it in a written documents to allow for the codification and assessment of pervious festivals.

A best practices guide should be created to facilitate the hosting of the annual event, to clarify the process of hosting the event and to build a mechanism within the best practices guide to create efficiencies and quality assurance metrics.

1.2 Project Outcomes

A Best Practices guide will be created for the Holy Transfiguration Greek Orthodox Church to help solidify the institutional knowledge of the planning and execution of the annual Alaska Greek Festival in order to clarify and organize the planning, execution and closing of the event.

1.3 Project Goals and Objectives

Project Goals include:

- Clearly defining how to host the Alaska Greek Festival to enhance the experience of the festival for the volunteers, parish members and the community.

Project Objectives include:

- Create a "Greek Festival Best Practices Guide" for use by the Holy Transfiguration Greek Orthodox Church in planning and executing their annual Greek Festival

- Document the institutional knowledge of how to host event

- Instill a clear set of operational standards for event

- Clearly define all processes involved in the planning, execution and close out for event

- Define timeline of planning process for events

1.4 Project Scope

The scope for this project will be limited to researching Greek festivals and the creation of the best practices guide.

Project Includes:

Research of Alaska Greek Festival

Research of Other Greek Festivals in the US

- Specifically Chicago and California festivals of like size

Create a Best Practices guide that will include the following:

- Initiation approval process
- Planning procedures
- Schedule management plan including a timeline for planning
- Financial management plan for festival funds
- Procurement management process
- Stakeholder management plan
- Communication plan for both volunteers, stakeholders and community
- HR/ Volunteer management plan
- Risk management process
- Quality management process
- Change management process
- Set up procedures, including layouts, installation and management best practices
- Clean up procedures
- Close out procedures

Copy of final Best Practice guide will be given to and Festival Chairperson in an electronic format

Project Excludes:

Researching other types of cultural festivals and fairs

Managing the execution of the Greek Festival

Best practice guide does not have to be accepted or implemented by Parish Council or Chairperson

1.5 Critical Success Factors

The critical success factors will be:

Meeting defined milestone deadlines

Access is given to documents relating to previous festivals

1.6 Key Performance Indicators

Key Performance Indicators for this project include:

% of milestones missed

With a threshold not to exceed 34% of total milestones

% of Overdue Project tasks

With a threshold not to exceed 34% of total project tasks

Schedule Performance Index

With a threshold not to fall below .95

1.6 Assumptions

Several assumptions have been identified for the Greek Festival Best Practices Project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

1. Key stakeholder support and involvement in research portion of project
2. Low risk project □ very limited risk management due to nature of research project

1.7 Constraints

Several constraints have been identified for the Greek Festival Best Practices Project. It is imperative that considerations be made for these constraints throughout the project lifecycle. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified for the project:

1. Deliverable must be complete by April 1st, 2016
2. Project Scope can expand to include additional sections of the Best Practices guide to address the needs of stakeholders
3. Budget can be increased if approved by Project Manager

1.8 Project Risks

Risks that could affect the project are as follows;

Internal:

Access to documents from previous festivals

Cooperation of current and past volunteers

External:

Ability to find information from other Greek Festivals

Greater detail and analysis will be documented in the Risk Registry and the Risk Management plan.

Section 2. Project Authority and Milestones

2.1 Funding Authority

The funding authority for this project is Allison Murrell. As this is a research based project there will be no funding made available.

Cost will be used to help track KPI's. Cost will be a placeholder amount equal to \$1 per man hour. No real funds will be provided or expended.

All documents, including the Final Best Practice Guide, will be sent electronically to prevent cost from being incurred.

2.2 Project Oversight Authority

The project advisory committee will be formed to oversee the project planning, execution and review of final deliverables.

They will have oversight and offer guidance on the project from accepting their role on the committee till the project is completed.

2.3 Major Project Milestones

The chart below lists the major milestones for the Greek Festival Best Practices Guide Project. This chart is comprised only of major project milestones such as completion of a project phase or gate review. There may be smaller milestones which are not included on this chart but are included in the project schedule and the Work Breakdown Structure (WBS). If there are any scheduling delays which may affect a milestone or delivery date, the project manager must be notified immediately so proactive measures may be taken to mitigate slips in dates. Any approved changes to these milestones or dates will be communicated to the project team by the project manager.

Milestone/Deliverable	Target Date
Letter of support submitted	9/16/15
Initial research methods approved	10/2/15
IRB Approval	10/23/15
PM Plan Draft submitted for review	11/6/15
PM Plan Approved/ Research Process Approved	11/20/15
Research Complete	1/7/16
Guide Sections I-XIII Drafted	3/31/16
Final Presentation Presented	4/18/16
Final Best Practices Guide Completed	4/18/16

Section 3. Points of Contact

Identify and provide contact information for the primary and secondary contacts for the project.

Role	Name/Title/Organization	Phone	Email
Project Manager	Allison Murrell	317-3198	ammurrell@uaa.alaska.edu
Primary Advisor	LuAnn Piccard	786-1924	lpiccard2@uaa.alaska.edu
Committee Advisor	Roger Hull	786-1924	rk Hull@uaa.alaska.edu
Committee Advisor	Seong Dae Kim	786-1924	sdkim2@uaa.alaska.edu

Section 4. Revision History

Identify document changes.

Version	Date	Name	Description
1	9/11/15	Original	Original Charter



HOLY TRANSFIGURATION GREEK ORTHODOX CHURCH

2800 O'Malley Road, Anchorage, Alaska, 99507-4256 · Tel: (907) 344-0190 · Fax: (907) 344-9909

September 17, 2015

LuAnn Piccard
University of Alaska Anchorage
Masters of Science in Project Management
3211 Providence Drive
Anchorage, Alaska 99508

RE: Letter of Support for Allison Murrell

Dear Ms. Piccard,

The purpose of this letter is to show support for Allison Murrell's capstone project to create a best practices guide for the annual Greek Festival.

The Greek Festival is the annual fundraiser for the Holy Transfiguration Greek Orthodox Church. The festival is held every August, since 1995, on the church grounds. It is an event designed to raise funds for the new church building, and to provide the opportunity for the community to experience Greek culture and activities, acting as a catalyst for community inclusion and involvement.

We have been in need of a document that solidifies and clarifies the processes that go into hosting the annual event, and we are excited about working with Allison to build this guide which we hope will further enhance our festival.

Please feel free to contact us if you have any questions or concerns. My cell number is (907)764-1464.

Sincerely,

Angelic Menegatos Pournatzis
Greek Festival Chairperson